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# FOREIGN AGRICULTURE CIRCULAR

U.S. DEPARTMENT OF AGRICULTURE  
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CITRUS  
FCF 3-65  
June 1965

## SUMMER CITRUS PROSPECTS

### FOR COMPETITION IN EUROPE

#### SUMMARY

Oranges: Exports to Europe from competing areas are forecast at about 12 million boxes, about 750,000 larger than last year. Increased exports from Brazil are expected. Frozen orange juice concentrate exports from Argentina and Brazil may decrease because of prospects of higher Florida production and declining world prices.

Grapefruit: Competing summer grapefruit supplies will again increase, with total exports to Europe estimated at 1.4 million boxes, 300,000 more than the previous season. The increasing production in Swaziland will add to supplies.

Lemons: Total exports of summer lemons, June to November, are forecast at 2.9 million boxes compared to 2.6 million last season. Undetermined is the degree of frost damage to this lemon crop in Murcia, Spain.

Heavy stocks of lemon juice in Sicily will continue to depress lemon juice prices.

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CURRENT SERIAL RECORDS



Table 1.--ORANGES AND TANGERINES: Production 1960-64 and exports to Europe from principal suppliers competing with the United States, summer seasons, 1961-65

Origin	1960	1961	1962	1963 1/	1964 2/
	Mil.	Mil.	Mil.	Mil.	Mil.
	boxes	boxes	boxes	boxes	boxes
Production: 3/					
Argentina 4/	22.6	21.5	21.8	22.5	16.0
Brazil 4/	25.0	25.0	26.0	24.0	28.0
Surinam	.1	.2	.1	.2	.2
South Africa, Rep. of	8.5	12.0	11.3	13.4	13.5
Total	56.2	58.7	59.2	60.1	57.7
	1961	1962	1963	1964 1/	1965 2/
Exports 5/					
Argentina	.06	.06	.14	.12	.05
Brazil	3.09	2.35	4.10	2.88	3.50
Surinam	.05	.09	.20	.03	.15
South Africa, Rep. of 6/	6.22	7.55	6.66	8.42	8.50
Total	9.42	10.05	11.10	11.45	12.20

1/ Preliminary. 2/ Estimated. 3/ Year of bloom. August and September. Boxes of 70 lbs. 4/ Includes unharvested production. Washington estimate of commercial crop. 5/ Shipments to Europe, May-November of year shown. Boxes of 70 lbs. 6/ Excludes exports to non-European markets.

Table 2.--GRAPEFRUIT: Production 1960-64 and exports to Europe from principal suppliers competing with United States, summer seasons, 1961-65

Origin	1960	1961	1962	1963 1/	1964 2/
	Mil.	Mil.	Mil.	Mil.	Mil.
	boxes	boxes	boxes	boxes	boxes
Production: 3/					
Argentina	1.15	1.30	1.36	1.67	1.50
Brazil	.30	.30	.50	.50	.50
Mozambique	.10	.15	.15	.15	.16
Surinam	.05	.10	.13	.13	.04
South Africa, Rep. of	.60	.90	1.15	1.51	1.85
Total	2.20	2.75	3.29	3.96	4.05
	1961	1962	1963	1964 1/	1965 2/
Exports: 4/					
Argentina	.5/	.5/	.02	.01	.01
Brazil	.05	.07	.11	.10	.10
Mozambique	.08	.09	.10	.11	.12
Surinam	.06	.13	.12	.02	.12
South Africa, Rep. of	.47	.60	.58	.78	1.00
Total	.66	.89	.93	1.02	1.35

1/ Preliminary. 2/ Estimated. 3/ Year of bloom, August and September. Boxes of 80 lbs. 4/ Shipments to Eastern and Western Europe, May-November of the year shown. Boxes of 80 lbs. 5/ Less than 10,000 boxes.

Table 3.--LEMONS: Production 1960-64 and exports to Europe from principal suppliers competing with United States, summer seasons, 1961-65

Origin	: 1960	: 1961	: 1962	: 1963 <u>1/</u>	: 1964 <u>2/</u>
	: Mil.	: Mil.	: Mil.	: Mil.	: Mil.
	: <u>boxes</u>	: <u>boxes</u>	: <u>boxes</u>	: <u>boxes</u>	: <u>boxes</u>
Production: <u>3/</u>					
Argentina <u>4/</u> .....	: 2.51	: 2.38	: 2.30	: 2.30	: 2.00
Chile.....	: 1.22	: 1.28	: 1.31	: 1.28	: 1.20
South Africa, Rep.of...	: .30	: .30	: .41	: .41	: .35
Italy (est. Verdelli) ..	: .94	: 1.14	: 1.04	: 1.66	: 1.70
Total.....	: 4.97	: 5.10	: 5.06	: 5.65	: 5.25
	: 1961	: 1962	: 1963	: 1964 <u>1/</u>	: 1965 <u>2/</u>
Exports: <u>5/</u>					
Chile.....	: .08	: .08	: .18	: .07	: .10
Italy <u>6/</u> .....	: 1.80	: 1.61	: 1.20	: 1.99	: 1.50
Spain <u>6/</u> .....	: .25	: .81	: .09	: .55	: .50
South Africa, Rep. of..	: .20	: .20	: .24	: .26	: .24
Total.....	: 2.33	: 2.70	: 1.71	: 2.87	: 2.34
Mediterranean only:					
June and July					
Italy.....	: 1.22	: 1.17	: .88	: 1.31	: 1.00
Spain.....	: .20	: .54	: .06	: .37	: .30
Total.....	: 1.42	: 1.71	: .94	: 1.68	: 1.30
Aug. and Sept.					
Italy.....	: .58	: .44	: .32	: .68	: .50
Spain.....	: .05	: .27	: .03	: .18	: .20
Total.....	: .63	: .71	: .35	: .86	: .70

1/ Preliminary. 2/ Estimated. 3/ Year of bloom, July, August and September. Boxes of 76 lbs. 4/ Includes unharvested production. 5/ Shipments to Eastern and Western Europe, June-November, including USSR, in 76-lb. boxes. 6/ Shipments to Europe, June-September.



## REPORTS ON COMPETING AREAS

### ARGENTINA 1/

#### Production

A rather severe drought is affecting most of the producing zone in Corrientes and Entre Rios Provinces, chiefly the latter. According to preliminary reports, it is expected that only 50 percent of the normal production will be harvested this year. Fruit sizes will be small.

The 1964-65 total crop is estimated at 16 million boxes of oranges and tangerines, 2 million boxes of lemons, and 1.5 million boxes of grapefruit. Production by types and provinces follows:

Province	Lemons	Tangerines	Oranges	Grapefruit
	<u>Metric tons</u>	<u>Metric tons</u>	<u>Metric tons</u>	<u>Metric tons</u>
Buenos Aires...	16,150	35,550	76,200	11,400
Corrientes.....	4,450	28,300	218,000	7,360
Entre Rios.....	4,650	82,250	68,530	19,700
Jujuy.....	9,950	7,550	27,450	4,730
Misiones.....	2,400	420	30,900	312
Salta.....	5,800	2,950	49,700	13,000
Tucuman.....	31,000	8,170	27,550	1,480
Other.....	4,600	22,010	29,670	2,518
Total 1963-64	79,000	187,200	528,000	60,500
Total 1962-63	79,300	195,000	496,500	49,500

Source: Department of Agriculture.

#### Exports

During calendar 1964, exports of oranges declined 48 percent but shipments of grapefruit rose slightly. Lemons and tangerines, which were exported in 1963 for the first time in many years, again disappeared from the export list.

#### Processing

In 1963 and 1964, processors are reported as paying the following prices for product fruit, f.o.b. indicated areas of production:

	1963 U.S. dol. <u>per short ton</u>	1964 U.S. dol. <u>per short ton</u>
Oranges: 1/		
Concordia (midseason)	16 - 22	19 - 25
do (Valencia)	29 - 32	38
Corrientes: (Bella Vista)		
Common orange	10 - 11	11 - 2/14
Grapefruit:		
Concordia	32	32 - 38
Lemons:		
Concordia	19 - 22	22 - 25

1/ All oranges are from fruit-fly-infested areas.  
2/ Price delivered to rail cars in bulk in August 1964.  
Trade sources.

1/ From despatches by Quentin R. Bates, Agricultural Attache, American Embassy, Buenos Aires, Argentina.

Trade sources report that 1964 utilization of citrus, mostly oranges, for products was about 80,000 metric tons of fruit, which produced about 4 million liters of single-strength juice and about 5,500 tons of frozen concentrates. The output of concentrates was lower than had been predicted, because of inability to export at remunerative prices.

All oranges processed in Argentina are from fruit-fly-infested areas.

#### Basis for Payment

Processors are attempting to work toward a system of paying for fruit on a solids analysis basis but they have not yet been able to get such a system universally established. Prices paid vary according to the date that the fruit is delivered, with higher prices being paid in general as the season progresses and the fruit becomes more mature with a higher sugar content. Growers who leave their fruit on the tree longest get higher prices but also incur greater risks of losses.

In 1964, processors were reported to have paid about \$0.86 each for 18-ounce No. 2 cans with lids, and \$0.43 each for 6-ounce cans with lids.

Product export prices in 1964 were reported as follows, f.o.b. Buenos Aires.

Item	Unit	Price <u>U.S. dols.</u>
Orange juice:		
Single strength.....	Case of 24 No. 2 cans	3.50
Do.....	Case of 48 6-oz. cans	2.90
Concentrate:		
Preserved, 65° Brix (packed in casks)....	Gallon	4.25-4.73
Frozen, 65° Brix.....	Gallon	3.50-4.25
Grapefruit juice:		
Single strength.....	Case of 24 No. 2 cans	3.25-4.10
Do.....	Case of 48 6-oz. cans	3.50
Concentrate: Frozen		
45° Brix.....	Gallon	2.70
Tangerine juice:		
Frozen concentrate 58° Brix	Gallon	2.90
Lemon juice:		
Single strength.....	Case of 48 6-oz. cans	3.20
Frozen concentrate (400 GPL).....	Gallon	2.50
Essential oils:		
Orange.....	Pound	.81-.95
Lemon.....	Do	7.64
Grapefruit.....	Do	2.86
Tangerine.....	Do	3.82



Wholesale prices of single-strength orange juice for use in Argentina were reported as \$8.07 per case of 24 No. 2 cans, and \$6.67 per case of 48 6-Oz. cans.

The difference in domestic and export price is at least partly due to import duty and other concessions granted export business.

#### Ocean Freight Rates

Ocean freight rates are currently US\$18.00 per metric ton for common stowage freight to Europe and US\$46.00 per ton to the United States and Canada. Frozen stowage is US\$53.00 per ton to Europe, and US\$82.00-\$83.00 per ton to the United States and Canada. All these are conference rates. Rates to Europe as low as US\$35.00 per ton for frozen stowage are sometimes obtained on non-conference vessels.

#### Juice Tests

The following are the juice yield, acidity, Brix and Brix-acid ratio of Argentine oranges and grapefruit:

Item	Juice yield	Acidity	Brix	Brix-acid ratio
Valencia oranges:				
1963:	<u>Percent</u>	<u>Percent</u>	<u>Degrees</u>	
August	50	1.1	10.0	9.1
September	51	.95	10.2	10.7
October	50	.90	9.8	10.9
November	46	.80	9.4	11.8
December	44	.75	9.5	12.7
1964:				
January	40	.60	8.8	14.7
Marsh seedless grapefruit:				
1963:				
June	48	1.55	7.5	4.8
September	44	1.45	8.5	5.9
October	45	1.40	8.5	6.1
November	45	1.30	8.0	6.2
December	43	1.25	7.5	6.0

URUGUAY 1/

#### Production Conditions

The main harvest of the 1965 citrus crop will begin this year about May 10. Fruits in the drought areas are smaller than they should be at this time of year and some are so shriveled they will not ripen.

1/ From a despatch by Henry L. Buckardt, Agricultural Attaché, American Embassy, Montevideo, Uruguay.



Fruits in the southern part of the country which are not in the drought areas appear to be growing normally. Low rainfall from April on in 1964 and continuing into 1965 has caused a very serious drought condition in some of the major fruit-growing areas. The harvest of fruit in this area will be extremely low; revised estimates of production for 1965 as compared with a year ago are down 13 percent.

Production(fresh fruit basis) was as follows:

Fruit	1963-64 <u>1/</u>	1964-65 <u>2/</u>
	<u>Metric tons</u>	<u>Metric tons</u>
Oranges.....	30,000	24,000
Tangerines.....	23,000	18,000
Lemons.....	13,500	11,000
Grapefruit.....	730	600
Hybrid tangerines....	2,320	1,900
Total.....	<u>69,550</u>	<u>55,500</u>

1/ Final. 2/ Estimate.

#### Marketing Situation and Outlook

No special problems are foreseen in marketing the 1965 citrus crop. The total production could be expected to be sold readily for local consumption. There is, however, a continuing increase in market demands for exports, mostly in the form of concentrated juice. Total exports during calendar 1964 were 14,290 metric tons (including the fresh fruit equivalent of 350.2 tons of concentrated orange juice exported to the United States and Sweden) as compared with 7,180 tons (including the fresh fruit equivalent of 110.2 tons of concentrated orange juice) exported during 1963. The higher exports were a direct result of the devaluation of the Uruguayan peso, which made exports profitable, plus good foreign demands for orange juice. Purchasers of fresh fruit in order of importance were the Netherlands 419.8 tons, Germany 147.2, and Sweden 40.2.

Only imports during 1964 were 12 tons of grapefruit from Argentina.

Juices for the soft-drink industry are placed in casks, smallest size of which is 10 liters. Orange juice for export is packed in 200-liter steel drums for frozen juice (0°F.) or in 2.8-liter tins for pasteurized juice.

#### BRAZIL 1/

#### Production

The production of citrus in Sao Paulo was relatively low in 1964 as a result of the 1963 drought. The trees have not fully recovered from the severe shock they had in 1963. At Matao, Araraquara, and Bebedoura, processors are

1/ From a despatch by W. Garth Thorburn, Agricultural Officer, American Consulate General, Sao Paulo, Brazil.

helping farmers increase production of certain types so that the processing plants will be sure of having enough quality fruit. These farmers' entire crops were sold under contract to the processors.

Beginning October of 1964, and continuing through until the first week of March, rainfall has been exceedingly heavy; the fruits which were not picked have accumulated so much moisture that they cannot be used. Fruit sizes will be large.

Total 1964 citrus production in Brazil was estimated officially at 66.4 million boxes, but the U. S. agricultural office estimates the crop much lower. Production data follows:

Item	<u>1964</u> Official
Oranges: <sup>1/</sup>	Mil. boxes
Sao Paula.....	20.4
Minas Gerais.....	7.5
Rio de Janeiro.....	6.2
Rio Grande do Sul.....	5.8
Parana.....	3.0
Santa Catarina.....	2.6
Guanabara.....	2.4
Bahai.....	2.0
Others.....	6.8
Total.....	<u>56.7</u>
Other citrus:	
Tangerines.....	5.0
Lemons.....	4.2
Grapefruit.....	<u>.5</u>
Total.....	<u>9.7</u>
Grand total.....	<u>66.4</u>

<sup>1/</sup> Production in states other than Sao Paulo does not exist in the quantities shown. Harvested production of oranges in Minas Gerais, Rio de Janeiro, Parana, and Rio Grande do Sul probably does not exceed a total of 3 million boxes. Ministry of Agriculture, Secretary of Agriculture, and Sao Paulo trade.

To evaluate the commercial harvested crop in Brazil, the Washington estimate of the 1964-65 crop is 28 million boxes of oranges and 500,000 boxes of grapefruit. Even this estimate is probably generous. If exports are 4 million boxes of oranges and processors use 4 million boxes and we allow a very large role of 5 million boxes each for the two major domestic markets, Sao Paulo and Rio de Janeiro, this totals only 18 million boxes and it is doubtful that the total of harvested oranges in the Other States of Brazil will exceed 4 million boxes.



## Consumption

Revised estimates on 1964 utilization of the Sao Paulo orange crop and a forecast for 1965 utilization are as follows:

	1964 <u>1/</u>	1965 <u>2/</u>
	<u>Mil. boxes</u>	<u>Mil. boxes</u>
Citrus processors....	2.0	4.0
Exports.....	2.9	4.1
Waste and Feed.....	3.0	4.0
Left on trees.....	1.0	.2
Domestic consumption.	10.1	11.7
Total.....	19.0	24.0

1/ Office estimate, revised. 2/ Office forecast

Four firms used oranges for juice. All oranges processed are from fruit-fly-infested areas. Firm No. 1 used 700,000 boxes; No. 2, 1,000,000; No. 3, 200,000, and No. 4, 100,000.

The fruit in 1964 was not particularly good quality and the season was late; hence, juice processed for export to Canada late in the season was not shipped in 1964 since the Canadian ports were closed because of ice.

Lemon juice, grapefruit, and orange juice mixtures have been appearing on the local market, and it is possible that in the near future Brazil will be consuming some of the citrus products it now exports.

## Prices

The following quotations are for cases of "type B" oranges from July 1964 through February 1965, on the Sao Paulo market (the major marketing season is July-November):

	Cruzeiros <u>1/</u>	U. S. dollars <u>1/</u>
1964:	<u>Per box</u>	<u>Per box</u>
July.....	2,000	1.66
August.....	2,000	1.46
September.....	2,500	1.55
October.....	2,300	1.40
November.....	3,800	2.32
December.....	2,500	1.50
1965:		
January.....	2,900	1.57
February.....	3,000	1.66

1/ Box of 25-30 kg.  
Trade sources.



This price sequence is a fine illustration of the effect of inflation. The July 1964 price of 2,000 cruzeiros per box is the same as the February 1965 price of 3,000 cruzeiros per box, in terms of foreign exchange.

### Trade

Exports of fresh fruit declined drastically in 1964 when compared with 1963; as a matter of fact they are the lowest since the 2 million boxes of 1958. The trouble was twofold: in the local situation, lateness of the crop and poor quality; in world markets, more competition from other sources. Of the total exports, Citrobrasil supplied 56.7 percent, Fisher 17.1 percent, Goodwin Coccozza 11.3 percent, Citrocola Brasil 10.6 percent, and Anglo 3.2 percent. The rest was divided among 9 exporters.

In 1965, total exports of fresh oranges may increase to 3.5 million boxes, but growing competition in world markets will continue as a restraining influence.

CHILE 1/

### Production

The 1964-65 orange crop is expected to be slightly lower than last year, around 40,000 metric tons compared with 42,500 metric tons the previous year.

### Imports

Orange imports during 1964 amounted to 77 metric tons, all of which, as usual, were imported from Argentina into the northern part of the country. Lemon imports during 1964 amounted to 11 metric tons from Peru--probably mostly limes--also all imported into the northern part of the country.

On February 16, 1965, Chile authorized an import quota of 2,500 metric tons of citrus fruit into the northern free food zone for the first semester of 1965, and a similar quota is expected to be authorized for the second semester.

The drought which affected the orchards of the central zone during 1964 damaged lemon production, and the 1964-65 yield is expected to be somewhat lower than the preceding years. The trade estimates 1964-65 lemon production at about 44,000 metric tons--a decline of 1,000.

### Exports

During 1964, exports of lemons amounted to 2,569 metric tons (70,000 boxes) 58 percent less than the previous year.

Country of destination	Quantity	Value
	Metric tons	U.S. dollars
Belgium.....	6	807
Netherlands.....	101	17,439
Germany.....	2,396	299,909
Sweden.....	4	550
Switzerland.....	62	8,500
Total.....	2,569	327,205

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1/ From a despatch by Waldo S. Rowan, Agricultural Attache, American Embassy, Santiago, Chile.

There were no exports of oranges.

## SOUTH AFRICA 1/

### Production

The 1963 crop, harvested in 1964, was reduced by frost in some areas and the 1964 crop to be harvested in 1965 will be reduced by drought, which has been most severe in the Transvaal.

The total 1964-65 crop is estimated nearly the same as the previous season: 13.5 million boxes of oranges, 1.4 million boxes of grapefruit, and 350,000 boxes of lemons.

A "mystery" disease is causing some concern to South African citrus growers. Known as "greening" or "yellow branch" (geeltak) and "bloubek," it has already caused large-scale damage to orange crops in the White River, Rustenburg, and Tzaneen areas and is still spreading. So far, it is unknown overseas.

Although this disease has been known in South Africa since 1928, it has caused only insignificant damage until recent years. During the period from 1932 to 1936, it did large-scale damage in the White River area, but afterward it practically disappeared. Since 1958 it has started to spread, and has been spotted in Zebediela, the Sunday's River Valley. Addo Research Institute, and Pietermaritzburg, in addition to the major infected areas. Experts suspect that the disease is caused by a virus, although it is not easily transmitted by budding or grafting. Extensive investigations are still being undertaken.

### Exports

South Africa is expanding orange markets in Continental Europe, and in 1964 its total exports to France and Germany were 3.3 million boxes, slightly more than the 3 million boxes exported to the United Kingdom.

The boycott of South African fruit in some Scandinavian countries seemed to have little effect on total exports.

In spite of the drought, exports in 1965 are expected to be about the same as in 1964. Estimates by originating area and kind are as follows:

Area of origin	Oranges	Grapefruit	Lemons
	1,000 boxes 1/	1,000 boxes 2/	1,000 boxes 1/
Northern and Central			
Transvaal.....	3,430	110	22
Eastern Transvaal.....	2,072	494	94
Western Transvaal.....	409	--	14
Natal.....	370	234	2
Cape Midlands.....	443	4	--
East Cape Coastal.....	2,038	487	65
Western Cape.....	483	9	20
Total.....	9,245	1,338	217
Swaziland, Portuguese			
East Africa and			
Rhodesia	358	398	16

1/ Boxes of 70 lb. 2/ Boxes of 65 lb.

1/ From a despatch by Edward J. Bell, Agricultural Attache, American Embassy, Pretoria, Republic of South Africa.



Table 4.--CITRUS: Exports from Argentina, Brazil and South Africa, 1964 1/

Destination	Oranges			Lemons			Grapefruit		
	Argen-	South	Argen-	South	Argen-	South	Argen-	South	
	tina	Brazil 2/	Africa	Africa	tina	Africa	tina	Africa	
	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	
	boxes	boxes	boxes	boxes	boxes	boxes	boxes	boxes	
Sweden.....	5	28	98		--	2	32	4	
Belgium.....	--	--	320		--	2	--	10	
Finland.....	3/	10	141		--	6	--	4	
France.....	--	184	1,751		--	58	--	136	
Germany, West...	3	263	1,518		2	32	4	121	
Netherlands.....	110	707	366		4	4	12	6	
Norway.....	2	34	158		--	1	--	3	
United Kingdom..	4	563	3,048		--	159	1	585	
Canada.....	--	37	612		--	--	--	2	
Other.....	4	97	835		--	4	1	25	
Total.....	128	1,923	8,847		6	268	18	81	

1/ Preliminary.  
2/ Nine months, January-September.  
3/ Less than 500 boxes.



## Processing

The use of citrus for products is tending to increase, as the following statistics on local sales indicate:

Year	Sales as fresh fruit <u>1,000 pounds</u>	Sales to processors <u>1,000 pounds</u>
1962.....	150,600	135,870
1963.....	114,960	205,590
1964.....	169,620	203,340

Three plants produce most of the export frozen concentrate and in 1960, two of these are reported to have produced 640,000 gallons of concentrate, about 5 million gallons single-strength equivalent. In addition, there are several soft-drink bottlers who produce industrial concentrates, and the canning plants at Capetown and Port Elizabeth produce canned single-strength juices and grapefruit sections, as well as essential oils and candied and brined citrus peel.

Exports of orange juice in recent years have been as follows:

Year	Single strength <u>1,000 Imperial gal.</u>	Concentrate and bases <u>1,000 Imperial gal.</u>
1958.....	594	357
1960.....	182	285
1962.....	427	390
1963.....	1,012	919
1964.....	619	1,063

In 1964, the major markets for single-strength juice were the United Kingdom and Western Germany. Major market for concentrates in 1964 included the United Kingdom, Canada, the Netherlands, Germany, and Belgium.

Frozen orange juice concentrate is also being sold in the domestic market at 21 U.S. cents per 6-ounce can.

## RHODESIA 1/

The last official publication on citrus population and production in Rhodesia was a Federal Government publication compiled by the Agricultural Section of the Central African Statistical Office, entitled "Report on Agricultural and Pastoral Production of Southern Rhodesia, Northern Rhodesia, and Nyasaland for 1956-57."

In 1956-57, the two Rhodesias had a total of 429,400 citrus trees--330,250 in Southern Rhodesia and 99,150 in Northern Rhodesia.

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1/ A trade report.

Since 1957, plantings in Southern Rhodesia have totaled at least a further 405,250 trees, so it is estimated that there are now at least 735,500 citrus trees there. About 80 percent are orange trees, i.e., Valencias, Mid-seasons, and Washington Navels. The balance is made up of Marsh seedless grapefruit, lemons (mainly Eureka and Lisbon), and tangerines in more or less equal quantities.

In 1956-57, production of citrus fruit in Southern Rhodesia was officially reported as 13,500 short tons. It is estimated that production during the 1964 citrus season reached a total of 50,000 tons, about 80 percent of which was oranges. Production will continue to rise by a few thousand tons of fruit annually for some years, since a substantial proportion--probably more than half--of the trees are still young.

It was recently announced that Portuguese authorities had awarded a contract for the erection of fruit precooling stores at the port of Beira in Mozambique. The first stage of the facilities are scheduled to be completed by the end of January 1966. There would then be sufficient precooling facilities for a seasonal throughput of at least 500,000 standard cases of citrus fruit from Rhodesia and Mozambique. It is not expected that exports of citrus fruit through Beira will reach this volume for some years. (Exports of citrus fruit from the Hippo Valley Estates in south Rhodesia will continue to be shipped through Lourenco Marques as at present).

Citrus plantings on the Mazoe Citrus Estate consist of the following varieties:

Valencias.....	157,941
Midseasons.....	74,355
Navels.....	8,267
Lemons.....	14,503
Miscellaneous.....	4,662
<hr/>	
Total.....	259,728

Just over 160,000 of these trees are still young and not in production. Further plantings will continue to be made, but the rate of planting has slowed down for the time being to about 10,000 new trees per year. Present production for the estate totals about 15,000 tons of fruit (of which just over 80 percent consists of oranges). Production will increase fairly steadily in future. Production is expected to double by 1973, to treble by 1979, and to quadruple by 1986.

Apart from Washington Navels (about 350 tons per year) the estate processing plant at present absorbs the total crops of oranges and lemons. Processed products are mainly exported, principally to the United Kingdom, in the form of orange concentrates, comminuted orange products, and lemon concentrate. Gold-pressed orange and lemon oils are produced for both export and local use. Canned single-strength orange juice is produced for the local market only. Dried citrus pulp meal is also produced for the Rhodesian market.



AUSTRALIA 1/

Production

The Australian 1964-65 citrus crop (1963 bloom) was a record one, owing partly to good crops harvested in New South Wales, but mainly to record production in South Australia. The good crops of Navels and record supplies of Valencias caused heavy oversupply on major markets, and during most of the season prices were at depressed levels.

The outlook for the 1965-66 season (1964 bloom) is for a much smaller citrus crop, mainly as a result of drought conditions in the eastern States. The 1964 bloom was rather patchy to start with, particularly in New South Wales and Queensland, and dry conditions during the summer further deteriorated crop prospects in these States. The New South Wales Department of Agriculture indicated recently that citrus soils in the coastal districts are the driest they have been in the past 19 years. Trees on nonirrigated properties are suffering severely, while even in some orchards where water is available the task of keeping all trees adequately watered proved difficult.

The present South Australian citrus acreage is approximately 17,000 acres, of which 9,500 acres are now bearing. Many of the 7,500 nonbearing acres will come into production over the next few years, and accordingly, South Australian production is likely to show an increase each year from now on, irrespective of seasonal conditions. Production data follow:

Variety	1962 <u>1/</u>	1963 <u>1/</u>	1964 <u>1/</u> <u>2/</u>
Oranges:	<u>1,000 boxes</u> <u>3/</u>	<u>1,000 boxes</u> <u>3/</u>	<u>1,000 boxes</u> <u>3/</u>
Navel.....	2,307	2,108	1,989
Valencia.....	3,457	3,821	2,743
Other.....	226	206	171
Tangerines.....	358	516	446
Lemons and Limes	509	675	505
Grapefruit.....	249	237	210

1/ Year of bloom. 2/ Forecast. 3/ Boxes of the following weights: oranges and tangerines, 70 lb.; lemons and limes, 76 lb.; grapefruit, 80 lb.

Commonwealth Bureau of Statistics, State Departments of Agriculture and trade.

Exports

Exports of citrus fruit during the 1964 shipping season reached a record level of over 1 million bushels. Malaysia and New Zealand were the largest buyers, but substantial quantities were also shipped to Hong Kong and the Philippines. With long-term production prospects showing a probable sharp increase in output during coming years, the industry continues to develop export sales to new markets. Trial shipments were made to a large number of countries this season, including Western Europe, Canada, and the Middle East.

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1/ From a despatch prepared by C. De Goede in the office of William L. Rodman, Agricultural Attache, American Embassy, Canberra, Australia.



Improved marketing practices no doubt also helped make Australian fruit more attractive to buyers. The adoption of recommendations made by industry leaders as a result of an export trade survey in 1962-63, which included name stamped brands, export of picked rather than clipped oranges to Southeast Asia, and the use of color additives to meet minimum color requirements, were found to assist sales appreciably.

In view of the expanding production, pressure for export markets is expected to continue in the near future. Grower organizations have requested the government to negotiate with several countries, including Japan, on easing the quarantine restrictions against Australian citrus fruit, and with the United States on permitting exports to Hawaii. Industry spokesmen have suggested that a group of Japanese officials be invited to Australia to show them that all citrus fruit could be supplied from fruit-fly-free areas and guaranteed to comply with the strictest quarantine conditions.

Exports of oranges from July to December 1964--the major marketing season--were as follows:

Destination	Quantity <u>1,000 boxes</u>
New Zealand.....	304
Malaysia.....	152
Hong Kong.....	52
Philippines.....	27
United Kingdom.....	14
Denmark.....	6
Norway.....	5
Canada.....	5
Netherlands.....	1
Other.....	22
Total.....	<u>588</u>

### Processing

Output of processed citrus products, largely single strength and concentrated juices, continued to rise during the past year. Production of candied peel has been affected by world demand and prices and remains at the relatively low level of about 2.5 million pounds. However, the volume of juice output has increased by about 50 percent since 1958-59. Production of single-strength juice during 1962-63 amounted to 7.3 million gallons, compared with 5 million gallons in 1958-59. Concentrated juice output showed a much greater proportionate rise, increasing from 33,000 gallons in 1958-59 to 405,000 gallons in 1962-63.

Citrus prices to processors were partly determined by the Fruit Industry Sugar Concession Committee. If processors pay the minimum prices for fresh fruit, set by the Committee, they receive a rebate on the sugar used in the end products, equivalent to about \$11 per ton of sugar when sold on the domestic market and about \$89 per ton when exported.

Minimum processing prices for June-May 1964-65 were as follows:

Delivered at metropolitan factory:	U. S. dollars Per short ton
Lemons.....	52
Sevilles, smooth skin.....	50
Sevilles, rough skin.....	45
Delivered at country factory:	
Lemons.....	46
Sevilles, smooth skin.....	45
Sevilles, rough skin.....	39

Sales of Valencias during the 1964 season were made to processors at between \$42-\$44 per short ton, delivered at the country factory.

### Trade

In fiscal year 1963-64, Australia exported the following quantities of orange juice:

	Quantity 1,000 gallons
United Kingdom.....	11
Canada.....	87
Other Commonwealth.....	18
United States.....	9
Other.....	14
Total.....	139

Exports also included about 2.4 million pounds of citrus peel, most of which went to the United Kingdom.

Australia imported in this period 49,000 gallons of lime juice (Windward Islands), 4,000 gallons of lemon juice, 5,000 gallons of orange juice, 38,000 pounds of lemon oil (Italy), 20,000 pounds of lime oil (Windward Islands), and 50,000 pounds of orange oil from Commonwealth countries, the United States, Italy, and other sources. About 120,000 gallons of "fruit juices and fruit syrups and cordials" (probably including bases) were also imported, about 16,000 gallons of which came from the United States.

### NEW ZEALAND 1/

The latest estimate of New Zealand's 1964 citrus fruit crop indicates that in 1963-64 (crop year beginning April 1), overall production increased only slightly, though there was a notable increase in orange production.

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1/ From a despatch by Donald J. Novotny, Agricultural Attache, American Embassy, Wellington, New Zealand.



Production data follow:

	1962-63 <u>1/</u>	1963-64 <u>2/</u>
	<u>Bushels 3/</u>	<u>Bushels 3/</u>
Lemons.....	73,613	76,500
Meyer lemons.....	14,138	13,650
New Zealand grapefruit...	167,000	165,100
Wheeny grapefruit.....	11,750	12,100
Sweet oranges.....	25,750	33,550
Mandarins.....	9,550	11,550
Tangelos.....	950	1,600
Total.....	<u>302,751</u>	<u>314,050</u>

1/ Revised estimates.

2/ Preliminary official estimates (forecast).

3/ Bushels of 40 lb.

Horticultural Division, New Zealand Department of Agriculture.

Local market requirements, particularly for oranges, are increasing steadily. Imports of oranges were up slightly during the past year. The fact that licenses granted for 1964-65 were not increased has meant that imports of U. S. fruit were precluded this past spring so that a larger volume of less costly fruit might be purchased with the available license funds to meet the basic quantitative requirement of the local market.

Table 5.--NEW ZEALAND: Imports of fresh citrus, 1962-63, and 1963-64

Variety and source	1962-63	1963-64	July-Dec. 1963	July-Dec. 1964
	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>
Oranges:				
Cyprus.....	3,427	4,095	424	
Jamaica.....	5,232	4,158	--	
Australia.....	20,632	20,370	14,032	17,642
United States.....	--	1,357	--	--
South Africa.....	1,677	2,093	2,093	1,815
Total.....	30,968	32,073	16,549	19,457
Lemons:				
Cyprus.....	--	124	--	--
United States.....	85	111	--	--
Communist China.....	<u>1/</u>	--	--	--
Western Samoa.....	--	1	--	<u>1/</u>
Total.....	85	236	--	<u>1/</u>
Grapefruit:				
Jamaica.....	670	650	--	--
Western Samoa.....	34	54	--	6
Society Islands.....	<u>1/</u>	--	--	--
Total.....	704	704	--	6
Other:				
Jamaica.....	241	309	--	--
Society Islands.....	<u>1/</u>	--	--	--
Communist China.....	<u>1/</u>	--	--	--
Australia.....	1	--	--	--
Total.....	242	309	--	--

1/ Negligible.

New Zealand Department of Statistics.



SURINAM 1/

Production

The current crop of all citrus in Surinam was set back by a serious drought in 1964.

Normally, there are two harvests annually, the major one in the July-September period and a smaller harvest, usually in January. As a result of last year's drought, not only was the smaller harvest (the first since the drought broke) reduced drastically in quality and quantity, but also the development of the fruit was retarded and the harvest consequently delayed until late March.

Citrus is recognized to be an important factor in the growth of Surinam's economy. The Ministry of Agriculture annually gives away 300,000 seedlings of improved varieties to citrus planters and even if no more than half of these come into production more citrus can be expected from this country in the future.

The drought extended from August 1963 until mid-May 1964; the blooming, harvesting, and marketing seasons are still unsettled and probably will not return to normalcy until next summer. This has negated one of the main advantages enjoyed by the Surinamese grower: the fact that his fruit is usually marketed in Europe during summer, when there are practically no receipts from the Mediterranean.

Official data on acreage of major citrus crops in Surinam, by size of grove, are as follows:

Year	In groves of 25 acres or more	In groves of less than 25 acres	Total
	<u>Acres</u>	<u>Acres</u>	<u>Acres</u>
1960.....	1,870	1,584	3,454
1961.....	1,914	1,936	3,850
1962.....	1,892	2,090	3,982
1963.....	1,980	2,134	4,114
1964 <u>1/</u> .....	2,200	2,200	4,400

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1/ Preliminary.

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1/ From a despatch by William B. Callan, Agricultural Attache, American Embassy, Port of Spain, Trinidad.

## Exports

Except for about 5,000 boxes of oranges and 2,000 boxes of grapefruit shipped annually to the Netherlands Antilles, the Netherlands is the destination for all fresh fruit exported by Surinam. Export data follow:

Year	Oranges Metric tons	Grapefruit Metric tons
1958.....	3,776	4,825
1959.....	5,972	5,995
1960.....	3,423	4,837
1961.....	858	956
1962.....	3,604	5,053
1963.....	6,324	4,323
1964.....	800	900
1965 <u>1/</u> .....	3,500	4,500

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1/ Forecast.

## Marketing Situation and Outlook

In 1961, private U. S. interests in cooperation with the Surinam Government established a plant to produce frozen concentrated citrus juice in Paramaribo. The plant, located in the harbor area, was equipped with modern concentrating and freezing equipment. In 1963, 56,873 gallons (U.S.) of frozen concentrated orange juice was shipped to the United States; in 1964, 45,891 gallons (U.S.) of frozen concentrated orange juice, and 28,178 gallons of frozen concentrated grapefruit juice was shipped to the United States. These three amounts represent the entire exportable production of the concentrating plant while it was in operation. The enterprise failed and the plant is not now in operation. As a consequence, about 60 percent of the exportable citrus produced in Surinam is not being exported and, in fact, a large part of the excess is being dumped.

If the plant reopens, the Growers Association will insist on a 30-percent quota for fresh fruit exports to protect the fresh fruit market that has been established in the Netherlands. While the plant was in operation all members of the Association, it is claimed, were required to deliver all of their fruit to the plant and, consequently, during that period the only fresh fruit available to supply the Netherlands market was that supplied by small independent growers and some fruit picked during periods when the plant was closed down. This is reported to have caused considerable ill feeling between the growers and the plant.

Even if 60 percent of the fruit delivered to the packinghouse does not meet the rigid specifications of the Dutch market, the steady increase in price makes citrus growing an attractive enterprise, and the juice plant may be

rejuvenated and brought back into production. Currently, marketing costs per box of fruit shipped to the Netherlands are as follows:

	<u>U. S. dollars</u>
Picking.....	.08
Hauling to packinghouse.....	.08
Sorting.....	.03
Loading.....	.03
Losses of field boxes.....	.05
Losses in packing.....	.02
Packing.....	.32
Box.....	.69
Hauling to dock.....	.02
Shipping fees.....	.07
Insurance.....	.02
Freight to the Netherlands.....	.95
Commissions in the Netherlands.....	.53
Total.....	<u>2.89</u>



UNITED STATES DEPARTMENT OF AGRICULTURE

WASHINGTON, D. C. 20250

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## EUROPEAN CITRUS MARKETING AND U. S.

### CITRUS TRADE REPORTED, 1963-64 SEASON

#### SUMMARY

European Citrus Trade: In 1963, Western Europe's 200 million customers consumed 70 million boxes of oranges and tangerines, 8 million boxes of lemons, and 4 million boxes of grapefruit. Higher consumer incomes, modern dietary standards, and increasing taste for some citrus products are leading to rising demand.

Western Europe, in 1963, imported 13 million boxes more oranges and tangerines than in 1951-55, one-third more lemons, and more than twice as much grapefruit.

The U. S. share of the orange market remained small in 1963. Growing European demand for both lemons and grapefruit has favored U. S. suppliers. In the 1951-55 period, less than 10 percent of European lemon imports came from the United States, contrasted with about 20 percent in 1963. For grapefruit, the U. S. share rose from about one out of 10 boxes for the 1951-55 average to about one out of eight in 1963. For U. S. lemons, Western Europe is the major offshore market. Increased use of grapefruit in Continental European markets indicates large future U. S. marketing opportunities.

U. S. Citrus Trade. In the 1963-64 season, total orange exports increased by nearly 1 million boxes in spite of continued short supplies in Florida; grapefruit exports increased slightly, and lemon exports were sustained at a near record--2.9 million boxes. Exports of hot pack orange juice concentrate and orange and lemon oil were sustained, but exports of all other citrus products declined.

U. S. product orange shortages resulted in imports of 2.1 million boxes of oranges, a million boxes more than the 1962-63 season. U. S. orange juice imports in 1963-64 totaled 8.8 million gallons, single-strength equivalent, 4.9 million gallons more than 1962-63.

As production is reestablished in Florida, imports of oranges and orange juice are expected to decline, and exports of oranges, grapefruit and their products to increase.



Table 1.--CITRUS FRUITS, FRESH: Imports into specified countries of Western Europe from the United States and other suppliers, average 1951-55, annual 1962 and 1963

Commodity and country	Average		1962		1963	
	1951-55					
	U. S.	Other	U. S.	Other	U. S.	Other
	1,000	1,000	1,000	1,000	1,000	1,000
	boxes <u>1/</u>	boxes <u>1/</u>	boxes <u>1/</u>	boxes <u>1/</u>	boxes <u>1/</u>	boxes <u>1/</u>
Oranges and tangerines:						
Austria.....	1	710	--	2,190	1	1,917
Belgium-Luxembourg...	972	2,519	456	3,656	472	3,263
Denmark.....	--	883	12	1,328	17	1,138
France.....	345	17,523	78	21,335	120	17,830
Germany, W.....	357	11,395	50	24,206	48	20,406
Ireland.....	11	413	9	552	--	570
Netherlands.....	727	2,346	543	6,195	425	5,678
Norway.....	69	1,503	85	1,580	84	1,492
Sweden.....	173	2,670	4	3,129	55	2,853
Switzerland.....	93	1,775	1	2,516	3	2,405
United Kingdom.....	9	12,079	42	12,485	4	11,389
Total.....	2,757	53,816	1,280	79,172	1,229	68,941
Lemons:						
Austria.....	8	298	33	632	93	513
Belgium-Luxembourg...	129	150	267	133	231	166
Denmark.....	--	127	28	157	65	124
France.....	14	1,304	350	1,870	755	1,349
Germany, W.....	146	1,974	46	3,729	246	3,009
Ireland.....	1	24	4	25	9	16
Netherlands.....	48	97	108	149	125	133
Sweden.....	9	123	56	86	72	76
Switzerland.....	<u>2/</u> 75	<u>2/</u> 459	33	468	38	422
United Kingdom.....	37	818	154	927	177	765
Total.....	467	5,374	1,079	8,176	1,811	6,573
Grapefruit:						
Austria.....	--	--	7	23	9	27
Belgium-Luxembourg...	89	94	69	113	54	130
Denmark.....	--	22	15	40	7	66
France.....	28	228	212	510	177	567
Germany, W.....	16	108	281	535	149	811
Ireland.....	1	18	8	23	5	29
Netherlands.....	22	45	103	156	59	198
Sweden.....	17	31	33	49	29	62
Switzerland.....	( <u>3/</u> )	( <u>3/</u> )	38	164	18	179
United Kingdom.....	19	1,258	136	1,641	22	1,569
Total.....	192	1,804	902	3,254	529	3,638

- 1/ Oranges, 70 pounds; lemons, 76 pounds; grapefruit, 80 pounds.  
2/ Includes grapefruit.  
3/ Included in lemons.

## EUROPEAN IMPORTS OF FRESH CITRUS

Oranges and Tangerines. In 1963, 11 Western European countries imported a total of 70 million boxes, about 10 million boxes less than the previous year. West Germany and France took more than half; the United Kingdom was the third most important market. For U. S. supplier, Belgium-Luxembourg and the Netherlands were chief European outlets, between them taking about three-fourths of the U. S. total.

Lemons. Lemon imports amounted to 8.3 million boxes, about 1 million boxes below 1962 levels. West Germany, France, and the United Kingdom were first, second, and third most important markets. In 1963, the United States supplied 1.8 million boxes, and France was the leading European market for U. S. lemons; West Germany and Belgium-Luxembourg were next in importance.

Grapefruit. In 1963, Western Europe imported a total of 4.1 million boxes of grapefruit, of which the United States supplied about one-half million boxes. For U. S. grapefruit, France was the leading European outlet, West Germany the next most important. The United Kingdom, Western Europe's principal grapefruit market, taking nearly half of total grapefruit imports, continued to limit U. S. imports by restrictive practices.

### WEST GERMANY 1/

Lemons. West Germany imported about 123,000 metric tons of fresh lemons during July 1, 1963-June 30, 1964--4 percent more than in 1962-63, but 8 percent less than the year before. The United States supplied more lemons, increasing its share of the market to about 17 percent, compared with only 2 in 1962-63. Italy's and Spain's market shares were 72 percent and 10 percent, respectively, compared with 74 and 13 the year before, with Italian lemon imports particularly heavy during the first half of 1964. Turkish lemon imports, after substantially increasing the year before, showed an 11 percent fall in 1963-64. During the winter season, the market for lemons was characterized by large supplies and consequent weak prices. The first shipment of California lemons arrived around the beginning of April, the bulk of U. S. lemons during July-October 1963. The small quantity imported from Arizona for the Christmas season were of good quality and sold well.

Oranges and Mandarins. In 1963-64, oranges accounted for 75 percent of all fresh citrus imports, compared with 74 percent the year before. Total orange imports increased 22 percent compared with the previous year, but only 5 percent compared with 1961-62. Spain and Morocco again led as suppliers of winter oranges, with Israel third and Italy fourth. Respective shares of the market were: 59 percent, 16 percent, 9 percent, and 6 percent, compared with 44, 14, 15, and 9 percent the year before. South Africa was the chief source of summer oranges, at 35,700 metric tons, and Brazil was second with 19,700. The United States supplied only 1,200 metric tons.

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1/ From a dispatch by Ernest Koenig, formerly assistant attache, American Embassy, Bonn, Germany.



Grapefruit and other citrus. Imports of grapefruit were approximately equal to those of the year before, with those from the United States declining 29 percent. Similarly, those from Israel, largest supplier, fell 12 percent, to 41 percent of the market. Morocco, South Africa, Honduras, and Cyprus were major gainers. Demand for the fruit was strong all season, with supplies particularly low and prices strong at the beginning of February.

West Germany's imports of fresh citrus fruit for 1963-64 compared with 1962-63 follow:

<u>Kind of fruit</u>	<u>1962-63 1/</u> <u>M.T.</u>	<u>1963-64 1/</u> <u>M.T.</u>
Lemons	118,167	122,915
Oranges	594,971	727,441
Mandarins	53,425	77,809
Grapefruit and other	37,390	37,279
Total	803,953	965,444

1/ Year beginning July 1.  
Federal Office of Statistics, W. Germany

Citrus Juices. In 1963, the United States, Spain, Israel, and South Africa all shipped more concentrated juices to Germany. However, by contrast, imports of single-strength orange and grapefruit juices from the United States were about half the level of 1962.

W. GERMANY: Imports of citrus juices and concentrates, 1962 and 1963  
(year ending June 30)

<u>Commodity</u>	:	<u>1962</u>	:	<u>1963</u>
	:	<u>Metric ton</u>	:	<u>Metric ton</u>
Citrus concentrates: 1/	:		:	
Orange & grapefruit, unsweetened	:	10,423	:	13,161
Lemon & lime, unsweetened 1/	:	427	:	320
Juices, single-strength: 1/	:		:	
Orange & grapefruit, unsweetened	:	16,242	:	14,357
Lemon & lime, unsweetened 1/	:	4,270	:	3,810
All citrus juices, sweetened	:	4,378	:	7,084
Total	:	35,740	:	38,732

1/ Also mixed.  
Federal Ministry of Agriculture, W. Germany.

FRANCE 1/

Citrus Fruits. French imports of fresh citrus fruit during September 1, 1963-August 31, 1964, increased sharply with the United States sharing especially in gains for lemons and grapefruit. U. S. shipments of the former rose from 16.9 thousand tons to 29.3 thousand, those of the latter from 5.7 thousand to 8.5 thousand. Orange imports from the United States continued small at 3.3 thousand tons.

The U. S. share of the market for lemons rose from 24 percent in 1962-63 to 36 percent in 1963-64, and grapefruit from 23 percent to 26 percent.

Citrus Juices. Imports of orange juice and lemon juice were up moderately, but grapefruit juice imports declined from 6.3 thousand metric tons to 5.1 thousand. Imports of orange juice from the United States were almost zero despite trade liberalization, as U. S. prices generally are above those of other exporting countries. Grapefruit juice imports from the United States also declined sharply from 3.4 thousand tons in 1962-63, to less than 1,000 tons last year. U. S. shipments of lemon juice to France, except in unconcentrated form, were negligible. Shipments of lemon concentrate from the U. S. declined sharply last year in contrast to a marked increase from Italy.

In 1963, the United States lost its dominance of the grapefruit juice market to Morocco, supplying only 17 percent of the total compared with 55 percent in 1962-63. The U. S. share of lemon juice imports also declined from 12 percent in 1962-63 to 8 percent in 1963-64.

Current Situation: French trade sources expect further expansion of citrus imports by France during the 1964-65 season because of the prospects of a continued rise in consumer incomes and anticipated further increases in output of citrus in the Mediterranean area. Orange imports from the United States are expected to continue small despite liberalization, and to be limited to Valencia types from California. Another large crop of apples and pears may limit demand for summer citrus.

The outlook for imports of lemons and grapefruit from the United States during the 1964-65 season appears favorable, as the French prefer the quality of U. S. fruit, but expanding production in several Mediterranean areas may result in increasing competition from that area.

BELGIUM 2/

For the first 5 months of 1964, the Belgium-Luxembourg Economic Union (BLEU) imported substantially more citrus than for the same period of 1963, according to trade data. Spain continues to be the dominant supplier of oranges to BLEU, accounting for 74 percent of imports in January-May 1964, compared with only 52 percent in the same period the year before. Israel maintained its second-ranking position, but the United States made gains, with 1,187 tons of orange imports, compared with none in the same period the year before.

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1/ From a dispatch by C. M. Purves, Assistant to the Agricultural Attache American Embassy, Paris, France.

2/ From a dispatch from Richard E. Bell, Acting Agricultural Attache, American Embassy, Brussels, Belgium.



The United States has maintained its position as the leading supplier of lemons and increased its sales 6.6 percent in the first 5 months of 1964 over the comparable period the year before. However, Italy also increased its exports of lemons to BLEU in early 1964 after making a large gain for the year 1963.

BLEU imported nearly one-quarter more grapefruit in January-May 1964 than in the same period last year, with Israel the major supplier. Imports of U. S. grapefruit were down compared with the same period of 1963.

BELGIUM: Citrus fruit imports by source, Jan.-Dec. 1963, and Jan.-May 1963-64

Commodity and source	Jan.-Dec.	Jan. - May	
	1963	1963	1964
	<u>Metric tons</u>	<u>Metric tons</u>	<u>Metric tons</u>
Oranges <sup>1/</sup> :			
Spain.....	57,500	32,161	58,298
Israel.....	20,103	18,910	13,555
Netherlands.....	3,884	1,308	392
United States.....	14,998	--	1,187
Italy.....	5,418	4,752	2,990
So.Africa, Rep. of..	7,294	--	--
Morocco.....	3,983	2,110	2,383
Total.....	118,613	62,882	79,361
Lemons:			
Italy.....	3,653	2,450	2,574
Netherlands.....	229	70	--
United States.....	7,969	2,233	2,969
Turkey.....	557	204	429
Israel.....	903	870	356
Total.....	13,703	6,035	6,434
Grapefruit:			
Netherlands.....	379	242	457
United States.....	1,980	445	292
Israel.....	3,393	3,173	4,054
So. Africa, Rep.of..	388	--	--
Total.....	6,686	4,073	5,011

<sup>1/</sup> Includes tangerines and clementines.  
National Statistical Institute, Belgium.

Table 2 .--FRANCE: Imports of fresh citrus fruit and citrus juices by origin,  
Sep. 1, 1963 - Aug. 31, 1964

Origin	Oranges		Lemons		Grapefruit:		Orange juice		Grapefruit juice		Lemon juice	
	1,000	m.t.	1,000	m.t.	1,000	m.t.	Unsweet-	Sweet-	One liter:	Over one:	Single-	Concen-
							ened	ened	or less	liter	strength:	trated
							Metric	Metric	Metric	Metric	Metric	Metric
							ton	ton	ton	ton	ton	ton
United States	3		29		8		4	1	574	312	16	1
Italy	--		24		--		86	--	--	--	110	211
Israel	6		3		15		191	--	368	231	--	--
Spain	270		17		( 2/ )		--	--	--	--	--	--
Algeria	122		2		2		265	1,724	511	14	--	17
Morocco	1/ 203		1/ 4		1		1,508	3,120	1,366	1,746	--	--
Tunisia	--		--		( 2/ )		--	--	--	--	9	--
Brazil	15		--		--		--	--	--	--	--	--
So. Africa, Rep.of:	49		--		3		--	--	--	--	--	--
Other	1		5		2		--	--	--	--	--	--
Total	669		84		31		2,054	4,845	2,819	2.	135	229

1/ Includes Tunisia.  
2/ Less than 500.



THE NETHERLANDS 1/

Oranges. In July 1, 1963-June 30, 1964, the pattern of trade had largely recovered from distortions of the preceding season caused by the poor Spanish crop and resultant increased prominence of Brazil, Israel, Morocco, and South Africa as suppliers. With the large Spanish crop dominating the market in 1963-64, only Morocco and South Africa were able to maintain gains made the season before.

With much larger supplies in 1963-64, orange imports were 14 percent above 1962-63 and 10 percent above 1961-62.

Grapefruit. Imports for 1963-64 were 15 percent above those of the preceding season, and 21 percent above 1961-62, with Israel replacing the United States by a wide margin as principal supplier. Surinam continued as an important source of supply of grapefruit. Grapefruit imports from Morocco were down sharply from 1962-63.

Lemons. The upward trend in imports continued with the aid of easier prices. The United States was the beneficiary, moving up by about 1,400 tons over 1962-63, but still falling short of the 1961-62 level.

Turkey gained substantial ground, while Italy held just below the level for 1962-63. Imports from all other direct sources were down sharply.

THE NETHERLANDS: Imports of citrus fruit and citrus juices, by origin, 1962-63 and 1963-64, year ending June 30

Origin	Oranges		Lemons		Grapefruit		Citrus juice	
	1962-63	1963-64	1962-63	1963-64	1962-63	1963-64	1962-63	1963-64
	1,000	1,000	1,000	1,000	1,000	1,000	Metric	Metric
	m.t.	m.t.	m.t.	m.t.	m.t.	m.t.	tons	tons
Belgium-Lux.....	6	6	( 1/ )	( 1/ )	( 1/ )	1	25	151
France.....	2	( 1/ )	--	--	--	--	--	--
Germany, W.....	1	1	( 1/ )	( 1/ )	--	--	--	--
Italy.....	( 1/ )	--	3	3	--	--	424	526
Spain.....	54	99	--	--	--	--	469	550
Israel.....	33	21	( 1/ )	--	3	5	467	1,121
Cyprus.....	1	1	--	--	--	--	--	--
Turkey.....	2	( 1/ )	( 1/ )	1	--	--	--	--
Algeria.....	1	2	--	--	--	--	--	--
Morocco.....	24	30	--	--	1	( 1/ )	--	149
Brazil.....	33	26	--	--	--	--	--	--
S. Africa, Rep.of:	9	9	--	--	--	--	81	366
Surinam.....	--	--	--	--	1	1	--	--
United States...	15	13	3	4	3	2	1,659	888
Others.....	7	3	1	1	1	2	403	617
Total.....	188	211	7	9	9	11	3,528	4,368

1/ Less than 500.

1/ From a dispatch by William K. Bing, Assistant Agricultural Attache, American Embassy, The Hague, Netherlands.



Outlook. Per capita consumption of citrus products is expected to continue to move strongly upward. For example, per capita orange consumption increased from 12 kilograms in 1958-59 to 15 kilograms in 1963-64. Shifts in sources of supply are likely, not only because of economic considerations, such as expanded production in the Mediterranean countries, but also because of application of EEC regulations. Rigid application of EEC minimum quality standards will probably begin in the 1964-65 season.

DENMARK 1/

Oranges. Denmark imported 43,361 metric tons of oranges during July 1, 1963-June 30, 1964, or 10 percent more than the preceding year's level. In the last few years Israel has become principal supplier, meeting 44 percent of total demand during 1963-64. According to importers, Israeli oranges are getting well-established in the minds of Danish consumers, largely as a result of an extensive advertising program. The latter involved Israeli investment of about 500,000 kroners (approximately \$70,000) in promotional activity during the past year.

Oranges imported from the United States totalled 699 metric tons, (July 1, 1963-June 30, 1964) or more than double the levels of the preceding year. U. S. oranges appear on the Danish market only in summer and early fall when Mediterranean supplies are not available. Sales of California Valencia oranges were probably somewhat slower than those of the same period a year before. Reportedly, summer sales of oranges, on the whole, were slower, partly because of higher prices, partly because of large imports of low-priced competitive grapes as well as abundance of domestic fruit which reduced demand for oranges.

Lemons. Danish imports of lemons from all sources totalled 6,654 metric tons, 3 percent more than the year before. U. S. lemons gained a strong hold on the Danish market during the past season, with sales increasing to 2,400 metric tons from 1,027 the year before, supplying 37 percent of the market in place of 16 percent for 1962-63. Italy maintained its position of major supplier, although imports from this source fell to 3,146 metric tons from 3,350 metric tons the year before. Also, imports from Israel declined.

Importers have expressed satisfaction with the excellent quality of the 1964 crop of U. S. lemons. Generally, most U. S. lemons sold to Denmark are shipped direct, but rather considerable quantities also are imported by Hamburg.

Grapefruit. Total imports of grapefruit increased July 1, 1963-June 30, 1964, to 3,192 metric tons from 2,520 metric tons the year before. The small demand for U. S. grapefruit improved, and total shipments from the United States were 403 metric tons compared with 257 for 1962-63. For a number of months in 1964, major supplies on sale in retail shops were of U. S. origin, and U. S. grapefruit was imported in larger quantities than during the comparable months a year before. In price and quality, these imports are considered competitive by local importers, but the consumer demand has been somewhat restricted by large availabilities of other types of fresh fruit.

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1/ From a dispatch by Harold L. Koeller, Agricultural Attache, American Embassy, Copenhagen, Denmark.



Citrus Juice. Danish imports of U. S. citrus juice declined sharply in July 1, 1963-June 30, 1964, totalling only 284 metric tons; comparable imports were 1,108 metric tons the year before when the United States was the principal supplier to the Danish market. The reduction in imports from the United States, a consequence of high prices following freeze-reduced output in Florida, was reflected in a drop of 27 percent in total imports, from 3,822 metric tons to 2,793. Greece became the principal supplier of orange juice during the year.

Canned Citrus Fruit. Total imports of canned citrus fruit declined in 1963-64 to 604 metric tons from 716 the year before. The bulk of these imports are canned tangerines from the Far East; some reduction in demand took place. The small quantity of canned grapefruit sections imported from the United States dropped to only 19 metric tons. Importers are somewhat pessimistic in their evaluation of the market for this product, apparently with the opinion that consumption cannot be increased without special promotional efforts. The Danes much prefer fresh grapefruit.

#### NORWAY 1/

Oranges. Total imports of oranges for July 1, 1963-June 30, 1964, rose 5 percent to 54,208 metric tons, indicating national consumption more than 32 pounds per capita. U. S. exports remained at a modest level--summer Valencias seem to be the only type marketable and stiffer competition from South Africa summer oranges is foreseen once unofficial boycott actions are lifted. Probably as a result of this boycott the past season, imports from the United States rose to 3,351 metric tons, as compared with 2,577 metric tons the previous year.

Norwegian trade dissatisfaction with quality of Israeli oranges and with that country's sales arrangements may reduce volume of oranges from Israel, while good-quality fruit and modern handling equipment may increase imports from Morocco. Spain undoubtedly will remain Norway's largest supplier of oranges.

Lemons. The United States continues most-favored source of supply for lemons because of uniform and high quality; thus, 77 percent of total lemon imports came from the United States in 1963-64.

Importers feel confident that the picture will remain virtually unchanged during 1964-65, with total imports of about 2,300 metric tons, of which the United States will supply between 1,700 and 1,900 metric tons.

Grapefruit. The Norwegian market for grapefruit remained near 1,000 metric tons, and importers see no reason to expect any increase during the current season. It seems that Norwegians do not care for grapefruit and have no inclination to include them in their diet. Total imports were 1,029 metric tons, compared with 1,073 metric tons in 1962-63; about one-half came from Israel, which is conducting a moderate-sized advertising campaign for its grapefruit.

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1/ From a dispatch prepared by Bjorn Leborg and submitted by Harold L. Koeller, Agricultural Attache, American Embassy, Copenhagen, Denmark.

NORWAY: Citrus fruit imports by source, 1961-62 to 1963-64,  
years ending June 30

Commodity and source	1961-62	1962-63	1963-64
	<u>Metric tons</u>	<u>Metric tons</u>	<u>Metric tons</u>
Oranges and tangerines:			
United States.....	2,942	2,577	3,351
Spain.....	26,963	14,971	25,494
So. Africa, Rep.of....	4,392	8,242	3,958
Israel.....	13,197	16,286	13,344
Brazil.....	200	1,503	1,730
Morocco.....	1,435	5,523	5,479
Others.....	936	2,607	852
Total.....	50,065	51,709	54,208
Lemons:			
United States.....	1,994	1,534	1,780
Italy.....	67	115	21
So. Africa, Rep. of...	37	178	159
Israel.....	65	216	111
Morocco.....	83	69	134
Others.....	51	274	97
Total.....	2,297	2,386	2,302
Grapefruit:			
United States.....	455	240	275
Israel.....	575	624	511
So. Africa, Rep. of...	64	141	143
Others.....	37	68	100
Total.....	1,131	1,073	1,029

Central Bureau of Statistics, Norway.

Citrus Juices and Canned Citrus. The bulk of Norwegian imports of citrus juices is made up of concentrates for the soft drink bottling industry. Sales of single-strength juices and frozen concentrates are insignificant, and little hope is expressed for a change in the immediate future. Spain is the main supplier of raw materials for the bottling industry and is expected to remain so as long as prices of Florida citrus juice remains high.

The main canned citrus product is canned tangerine sections from Japan; these are relatively low-priced and are becoming increasingly popular as a dessert ingredient.



SWEDEN 1/

Sweden imports of fresh citrus for July 1, 1963-June 30, 1964, were substantially above the level of recent years.

Oranges. U. S. oranges continue to be a minor factor in the market in spite of increased imports in 1963-64. As a supplier, Spain regained first place from Israel and provided almost half of all imports. Imports from South Africa dropped off drastically, in part because of unwillingness of certain Swedish importers and retailers to handle goods from that source. The increase in total imports stems largely from lower orange prices in 1963-64, and from continued prosperity and high living standards in Sweden.

Citrus Juices. Imports of citrus juice declined somewhat. Israel became principal supplier, while the U. S. share dropped to considerably less than half the 1962-63 level. The decline seems particularly serious in terms of juice sold in consumer-size containers (i.e., 3 kilograms or less). In this segment of the market, U. S. juice has been predominant, but in 1963-64 this category of juice imports from Israel doubled while those from the United States were lower by almost 60 percent.

On a single-strength basis, however, juice imports may have been as large as, or larger than, those of the year before, since official juice import statistics make no distinction between single-strength juice and concentrates. This possibility is suggested by the fact that imports of citrus juice in larger containers, weighing more than 3 kilograms (the form in which concentrates are most often shipped) increased in 1963-64. However, imports in this category come principally from Spain, Italy, and Israel, rather than the United States.

In 1963-64, Israel, Italy, Spain, Greece, and other countries increased their share of the total market. The quality of Jaffa oranges and Israeli juice is said to correspond to the Swedish taste by its sweetness, while juice from Greece is said to be of varying quality.

The concentrates are used largely for production of various orange-flavored beverages--mostly uncarbonated--sold either for direct consumption or in concentrated form for mixing in the home.

Current Situation. Imports of grapefruit and lemons for 1964-65, are expected to exceed those of the 1963-64 level, while orange imports may not increase. As the Spanish orange crop is reported to be large, it may be assumed that a larger share will be taken from that country. United States grapefruit will hold or increase its share of this market, although Israel is likely to hold on to its newly-won position as principal supplier.

Prospects do not appear good for an increase in imports and consumption of single-strength orange juice, chiefly because of the emergence of cheaper beverages and concentrates, based on citrus juice, and the apparently successful merchandising methods being employed to sell these products.

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1/ From a dispatch prepared by Georg Frostenson and submitted by Hugh W. Robinson, Agricultural Attache, American Embassy, Stockholm, Sweden.

Swedish imports of fresh citrus fruit and citrus juices for July 1, 1963 to June 30, 1964, compared with the same period a year earlier, follow:

	1962-63		1963-64	
	U. S.	Total	U. S.	Total
	<u>M.T.</u>	<u>M.T.</u>	<u>M.T.</u>	<u>M.T.</u>
Citrus fruit:				
Oranges and mandarines	310	95,818	2,345	107,940
Grapefruit	837	3,318	1,459	3,979
Lemons	1,619	5,009	2,724	5,252
Total citrus fruit	<u>2,766</u>	<u>104,145</u>	<u>6,528</u>	<u>117,171</u>

Citrus juice:

Unsweetened	2,886	6,186	1,208	5,858
Sweetened	<u>115</u>	<u>138</u>	<u>72</u>	<u>108</u>
Total citrus juice	<u>3,001</u>	<u>6,324</u>	<u>1,280</u>	<u>5,966</u>

The unsweetened juice was distributed by type of containers as follows:

Container size

More than 3 kilograms	149	2,454	76	2,676
3 kilograms or less	<u>2,737</u>	<u>3,732</u>	<u>1,132</u>	<u>3,182</u>
Total	<u>2,886</u>	<u>6,186</u>	<u>1,208</u>	<u>5,858</u>

FINLAND 1/

There was some evidence of a softening in the market for imported fruits in Finland in 1964, compared with 1962 and 1963 average consumption levels, considered more or less normal. Retail sales will be affected by the large domestic berry and apple crops harvested in 1964. Furthermore, consumer purchasing power has decreased because of higher prices of staple foods, and of family investments in consumer durables. Importers are therefore exercising some caution.

In the past few years, the United States has had a moderate share of the limited market for lemons and grapefruit. Purchases of these fruits from the United States in January-July 1964, were equivalent to 44 percent and 27 percent, respectively, of total imports of these items. On the other hand, imports of oranges from the United States in this period were less than 1 percent of the total, even though 10 times as large as 1962 and 1963 shipments. Importers ascribe this lack of interest to the high price of California oranges in relation to those from other suppliers.

1/ From a dispatch prepared by Miss E. Kaukillio and submitted by John Q. Blodgett, Counselor of Embassy, American Embassy, Helsinki, Finland.



FINLAND: Imports of citrus fruits and products, 1962-63 and Jan.-July 1964

Commodity	1962		1963		Jan.-July 1964	
	U. S.	Total	U. S.	Total	U. S.	Total
	M.T.	M.T.	M.T.	M.T.	M.T.	M.T.
Citrus fruit:						
Oranges, entered:						
Jan.-June	7.4	25,408.5	--	26,456.7	66.3	27,355.9
Oranges, entered:						
July-Dec.	--	6,924.4	7.5	5,107.3	3.4	294.9
Mandarins and						
clementines	--	1,474.6	--	2,382.4	--	1,527.2
Grapefruit	308.6	1,243.8	551.0	1,599.6	425.3	1,584.8
Lemons	991.5	2,429.0	882.9	2,735.4	909.9	2,073.7
Fruit, other	--	44.9	--	0.1	--	42.3
Citrus products:						
Peels, dried	--	12.3	--	13.1	--	6.6
Peels, preserved	--	25.8	--	42.5	--	30.3
Jam, jelly and						
marmalade	--	11.3	1.1	7.8	0.4	10.9
Puree and paste	--	0.3	--	0.6	--	0.1
Grapefruit, pulped:	--	0.6	--	--	--	--
Other fruit, "	--	2.2	--	2.9	--	2.4
Grapefruit, canned:	2.0	2.8	--	0.2	--	16.6
Other fruit, "	0.1	22.1	0.2	16.4	0.2	49.4
Citrus juices:						
with or without						
added sugar	53.9	654.0	44.9	659.6	16.1	520.0
Non-alcoholic						
preparations						
for soft drink						
industry 1/	(12.7)	(1,387.6)	(19.1)	(2,568.6)	(2.3)	(1,578.2)

1/ Contains sugar, citric acid or preservative, etc. (also includes large quantity of cola extract.)

AUSTRIA 1/

Tariffs, Import Taxes. Austria eliminated relatively high tariffs on citrus juices, effective October 1, 1964. However, juices will continue subject to payment of a 5.25 percent import tax. Also, fresh citrus fruit is now admitted duty-free and without payment of import "equalization" tax. Provided the trade passes resultant savings on to consumers, sales should benefit appreciably.

Fresh Citrus Fruit. For November 1, 1963-October 31, 1964, Austrian imports of citrus fruit are expected to register a record level. It is expected that the year's data will show percentage increases, over 1962-63 levels, of lemons, 15 percent; oranges, 15 percent; tangerines, 67 percent. Imports of grapefruit are not expected to be higher than in 1962-63. Aggregate imports of all kinds of fresh citrus fruit may exceed those made last year by as much as 15,000 metric tons, or nearly 20 percent.

1/ From a dispatch from the office of Henry A. Baehr, Agricultural Attache American Embassy, Vienna, Austria.

The sale of fresh citrus so far this season has been greatly aided by the duty-free status of imports and a favorable relationship of retail prices for citrus compared to apples. During November 1963-July 1964, apples retailed at prices ranging up to 30 percent higher than those of a year before, while most of this time oranges cost 5 to 29 percent less than a year before, and fresh lemons 16 to 40 percent less.

Monthly imports, November 1, 1962-October 31, 1963, and the first 9 months of 1963-64 indicate that U. S. suppliers have not been able to maintain their share of the market in competition with fruit from Italy, Spain, Israel, and others.

Citrus Juices. Single-strength juice imports for 1963-64 are expected to be about 2,500 metric tons, about the same as the year before. Late in 1964, canned juice imports started an upward trend, caused by a rise in numbers of camping tourists, expansion of supermarket facilities and food chains, and greater prosperity.

For 1963-64, there was a sharp drop in purchases of sweetened citrus juices, while imports of all other single-strength juice items were up, especially of unsweetened orange and lemon juice.

U. S. juice imports appear to have declined notably in recent years, gradually giving way to Israeli, Italian, and other southern European-produced juices.

Citrus Concentrates. Most imports are used to make relatively expensive soft drinks. The estimated output of soft drinks increased from 75,000 metric tons in 1960 to 160,000 in 1964, and imports of concentrated citrus juices from 318 metric tons to 400. Consumption is limited primarily to higher-income groups. Household use of frozen concentrates, limited by lack of deep-freeze equipment, has not advanced beyond small beginnings, but may benefit from growth of supermarket-style retail stores.

Imports may score moderate gains in the years ahead. Data for the first 9 months of 1963-64 indicate that for the year aggregate imports of orange, lemon and grapefruit juice concentrates may have reached 430 metric tons, about 44 percent above the 3-year average, 1960-63. Concentrated orange juice is supplied mainly by Italy, Spain, and Israel. The U. S. share of the market declined while Mediterranean suppliers advanced. The United States sold only 6.6 percent of total imports for November 1963-July 1964 contrasted with approximately 11 percent in 1962-63.



AUSTRIA: Imports of fresh citrus fruit and citrus juices,  
seasons 1960-61 through 1963-64

Commodity	: 1960-61	: 1961-62	: 1962-63	: 1963-64 <sup>1/</sup>
	: <u>Metric tons</u>	: <u>Metric tons</u>	: <u>Metric tons</u>	: <u>Metric tons</u>
Citrus fruit:	:	:	:	:
Lemons	: 19,837	: 23,115	: 20,864	: 23,900
Oranges	: 57,150	: 61,651	: 57,303	: 66,000
Tangerines	: 6,154	: 6,868	: 4,864	: 8,100
Grapefruit	: 1,158	: 1,058	: 1,348	: 1,300
Total	: 84,299	: 92,692	: 84,379	: 99,300
Citrus juice:	:	:	:	:
Grapefruit	:	:	:	:
Unsweetened <sup>2/</sup>	: 454	: 599	: 532	: 600
Sweetened <sup>2/</sup>	: 38	: 24	: 21	: 50
Orange, lemon	:	:	:	:
Unsweetened	: 804	: 973	: 1,160	: 1,400
Sweetened	: 361	: 700	: 801	: 450
Total, single-	:	:	:	:
strength	: 1,657	: 2,296	: 2,514	: 2,500

<sup>1/</sup> Preliminary estimate, based on official import data for period, Nov. 1963-July 1964.

<sup>2/</sup> This item may include a varying proportion of pineapple juice.

Austrian Central Statistical Bureau.

SWITZERLAND <sup>1/</sup>

Swiss citrus fruit imports increased significantly in 1964, as prices were again lower. (For 1963, imports had amounted to 99,474 metric tons, 5 percent less than in 1962.)

For the first six months of 1964, imports of all citrus fruit reached 80,751 metric tons as against 63,466 metric tons in 1963. For the latter year, main suppliers of oranges and tangerines were Italy, Spain, and Israel; of lemons, Italy; and of grapefruit, Israel. During 1963, the U. S. share of this market was 0.1 percent for oranges and tangerines; 8.3 percent for lemons; and 9.1 percent for grapefruit.

Imports of fruit juices--single strength and concentrated--showed the same movement, decreasing in 1963 as compared with 1962, but during the first six months of 1964 rising again to 1,932 metric tons. This compared with 1,533 metric tons during the same period of 1963. Shipments from the United States, as chief supplier, had declined from 2,302 metric tons in 1962 to 1,184 in 1963, constituting 43 percent of all citrus juice imports that year. The main competitor of the United States was Israel, supplying 467 metric tons in 1962, 680 metric tons in 1963. Orange juices from Israel are reported to be lower in price at the import level and of higher quality; by higher quality, importers understood this to mean sweeter taste from higher fruit sugar content.

<sup>1/</sup> From a dispatch prepared by A. Eberhard and submitted by Print Hudson, Agricultural Attache, American Embassy, Bern, Switzerland.

Swiss imports of fresh citrus fruit and juices for 1963 and the first six months 1964, follow:

<u>Commodity</u>	<u>1963</u> <u>M.T.</u>	<u>Jan.-June 1964</u> <u>M.T.</u>
Citrus Fruit:		
Oranges and tangerines	76,450	64,803
Lemons	15,869	9,911
Grapefruit	7,155	6,037
Total	<u>99,474</u>	<u>80,751</u>
Citrus juices:		
Fruit juices, single-strength or concentrated	2,731	1,932
Lemon juice, raw or clarified, for technical use only	251	137
Total	<u>2,982</u>	<u>2,069</u>

Compiled from Official Customs Statistics.

#### UNITED KINGDOM 1/

Government Policy. There has been no change in U.K. government policy regarding importation of citrus fruits and fruit products. The discrimination which has effectively curtailed our entry into this market for winter grapefruit and some citrus products still exists. The continued British discrimination against U. S. winter grapefruit, grapefruit sections, and orange and grapefruit juice is the major remaining trade barrier to U. S. citrus in Europe.

Quotas for canned grapefruit sections for orange juice (other than frozen orange juice concentrate) and grapefruit juice remain unchanged from last year. The U. K. Board of Trade has announced the Dollar Area quota for the period, October 1964-September 1965, as follows: canned grapefruit sections \$1,260,000, c.i.f.; orange and grapefruit juice, \$840,000, c.i.f. Only frozen orange juice concentrate and lemon juice are being admitted from the Dollar Area without restrictions.

Citrus Fruit. For the first 7 months of 1964, grapefruit imports were 21 percent greater than for the same period the year before. Israel continued to be the major supplier and increased its share of this growing market; gains in sales were also posted by other major suppliers, including South Africa and Cyprus. U. S. grapefruit is excluded from the U. K. market in the period October 1 to March 1.

Imports of oranges were 15 percent greater. Israel continued to be the major supplier, having shipped about the same quantity as a year earlier, while Spain more than doubled its exports.

1/ From a dispatch by Turner L. Oyle, Assistant Agricultural Attache, American Embassy, London, England.



The market for lemons was less expansive. Minor shifts occurred in market shares, and Italy continued to be the major supplier, increasing sales and regaining some of the market lost a year ago.

1964-65 Sea Freight Rates for Citrus Fruit to the United Kingdom

U. S. East Coast	-	not exceeding 1-4/12 cu. ft., classed as halves, \$0.70 contract; not exceeding 2-9/12 cu. ft., \$2.20, contract; halves bundled two to a package, not exceeding 2-9/12 cu. ft., \$2.20; sealed fiber cartons not exceeding 1-4/12 cu. ft. \$0.70.
U. S. Florida	-	70-lb. case, \$0.70
U. S. West Coast	-	40-lb. case, \$1.10
Canada, Montreal	-	box not exceeding 2.2 cu. ft., \$2.85
Spain	-	30-32 kilo case, \$0.60 or \$0.63 (depending on port)
Israel	-	standard box, \$0.94; half-box, \$0.52; cartons, \$0.49
S.Africa, Rep. of	-	cubic (measurement) ton, \$24.84
Australia	-	half-bushel carton, \$1.18

Lemon Juice. Prices of all lemon juice products from the Mediterranean have declined substantially from levels recorded a year ago. Anticipated price of lemon juice concentrate (4:1) is between \$2.10 and \$2.24 per Imperial gallon c.i.f., compared with last year's range of \$3.50 to \$3.65. Lemon oil, machine pressed, is expected to be priced at about \$3.84 per pound, c.i.f. this season. This is approximately \$0.70 below last season's price.

Grapefruit and Orange Juices. It is anticipated that prices of industrial single-strength grapefruit juice will be near, or slightly higher, than last year's when British West Indies juice was selling at \$0.90 per gallon, c.i.f. It is anticipated that grapefruit juice concentrate (4:1) will sell from \$2.76 to \$2.80 per gallon this year, or \$0.14 higher than last year. Orange juice concentrate from the Mediterranean area is likely to be selling at about the same level as last year, since supplies are expected to be adequate. Prices of Florida orange oil, high following the freeze, are expected to decline to competitive levels, forecast at \$0.42 per pound. British West Indies distilled lime oil may be more expensive this year; currently the forecast is \$8.40 per pound, or \$0.84 per pound higher than last year. Mandarin oil from Sicily is at present in short supply, and prices relatively high; it is used in making soft drinks and jellies, so is not competitive with other citrus oils.

Grapefruit Sections and Other Canned Products. The recent retail price of Israeli 20-ounce can of grapefruit sections was \$0.30, and British West Indies sections from about \$0.29 per can. Canned B.W.I. and Israeli single-strength grapefruit juice was being sold retail at \$0.25 per 19-ounce can--slightly higher than last year.

It should be noted that there is little differentiation at retail in terms of quality for canned citrus products. It is common to place a number of cans of citrus products together in one section of the counter and to have one price. It appears that product price differentiation based upon quality and country of origin have not been very effective up to this time.

The general trend in citrus imports into Ireland continues each year to rise. However, lemon imports during 1963 were below those of 1962. Israel and Brazil were Ireland's largest orange suppliers in 1963, with both countries showing major increases. Israel led as grapefruit supplier, also.

Heavy imports of grapefruit into Ireland during January-June 1964 caused a temporary glut, and at present many importers are finding it difficult to sell grapefruit. Most of the imports are from the United States, and one brand dominates the market.

IRELAND: Imports of citrus fruit and citrus juice, by source,  
Jan.-June, 1963 and 1964

Commodity and source	January	
	1963	1964
Citrus fruit:		
	Cwt.	Cwt.
Oranges:		
Spain.....	31,643	48,089
Israel.....	131,936	141,948
S. Africa, Rep. of..	17,274	9,825
Brazil.....	38,810	--
Morocco.....	--	5,686
Others.....	3,587	10,603
Total.....	223,250	216,151
Grapefruit:		
Israel.....	8,238	11,781
Cyprus.....	2,616	--
S. Africa, Rep. of..	1,743	944
United States.....	2,203	1,575
Trinidad & Tobago...	--	900
Others.....	396	4,189
Total.....	15,196	19,389
Lemons:		
Italy.....	4,276	6,320
Spain.....	--	880
Israel.....	18	1,322
S. Africa, Rep. of..	237	--
United States.....	2,028	1,664
Others.....	7,204	10,729
Total.....	13,763	20,915
Citrus juices		
United Kingdom.....	6,563	10,197
Netherlands.....	1,599	610
Spain.....	--	1,803
Italy.....	1,906	917
Israel.....	6,511	--
S. Africa, Rep. of..	--	1,964
United States.....	4,090	7,152
Canada.....	1,171	1,006
Others.....	23,871	40,352
Total.....	45,711	64,001

1/ From a dispatch by C. S. Stephanides, Agricultural Attache, American Embassy, Dublin, Ireland.



U. S. CITRUS TRADE

U. S. EXPORTS

Orange and Grapefruit Products Exports: In the 1963-64 season, total U. S. exports of Florida-produced single-strength orange juice continued to decline to 1.1 million cases, 800,000 cases less than 1962-63 exports and 1.5 million cases less than the 1961-62 season. Total exports of single-strength grapefruit juice also declined sharply to 800,000 cases compared with exports of 1.7 million cases in 1962-63 and 2.2 million cases in 1961-62.

Total exports of hot-pack orange juice concentrate have been fairly well sustained, since most export juice of this type is produced in California. This area did not suffer the tree-damaging freeze experienced by Florida in the 1962-63 season. Hot-pack orange juice exports in 1963-64 totaled 965,000 gallons, compared with 982,000 gallons in 1962-63 and 1.1 million gallons in 1961-62.

Frozen orange juice concentrate exports continued to reflect U. S. shortages and total 1963-64 exports were 2.5 million gallons compared with 3.6 million gallons in 1962-63, and 4.9 million gallons in 1961-62.

Grapefruit section exports followed the same pattern, declining for the second season to 147,000 cases compared with 211,000 cases in 1962-63 and 354,000 cases in 1961-62.

The continuation of restrictive discriminatory import quotas by the United Kingdom seriously limits U. S. exports to that market of non-frozen orange juice, grapefruit juice, and grapefruit sections.

Lemon Juice. Total U. S. exports in 1963-64 declined to 879,000 U. S. gallons, single-strength equivalent, compared with exports of 1 million gallons in 1962-63 and 1.9 million gallons in 1961-62.

Essential Oils. Lemon oil exports in 1963-64 totaled 430,000 pounds, compared with exports of 237,000 pounds in 1962-63, and 620,000 pounds in 1961-62. Exports of orange oil were sustained in spite of our continued shortage of orange products. Total exports in the 1963-64 season were 3.2 million pounds, compared with 3 million pounds in 1962-63, and 3.1 million pounds in 1961-62.

U. S. IMPORTS

Continued orange shortages resulting from the 1962-63 freeze damage in Florida resulted in further increases in imports of oranges and orange juice in 1963-64. Orange imports for November 1, 1963 through October 31, 1964, totaled 2.1 million 70-pound boxes, about 1 million boxes more than for the previous season. Major suppliers were Mexico, Haiti, and Israel.

In the same period, orange juice imports totaled 8.8 million gallons, single-strength equivalent, compared with 3.9 million gallons in the previous season. Major suppliers to the United States of orange juice in 1963-64 were Mexico, 3.9 million gallons; British Honduras, 1.8 million gallons; Argentina, 1.3

and Surinam 531,000 gallons. Some juice was also imported from Australia, Canada, Israel, Jamaica, Morocco, South Africa, and Uruguay.

Some of the oranges imported were used by processors and nearly all of the imported orange juice was used by U. S. processors to supplement domestic supplies. Most imported juice was blended with U. S. produced juice and sold under U. S. brands. A small quantity of Israeli-produced single-strength orange juice was imported and sold under a foreign label.

Imports of oranges and orange juice are expected to decline by the 1965-66 season when Florida orange supplies will probably be more nearly normal.

Lemon juice imports in 1963-64 declined to 964,000 gallons, single-strength equivalent, compared with imports of 2.4 million gallons the previous season.

Imports of concentrated lime juice in 1963-64 declined to 89,000 gallons, single-strength equivalent, compared with imports of 269,000 gallons the previous season. In contrast, imports of single-strength lime juice totaled 648,000 gallons, 160,000 more than for 1962-63.

Orange oil imports in 1963-64 declined to 120,000 pounds compared with 135,000 pounds the previous season. Lemon oil imports declined sharply to 264,000 pounds compared with 749,000 pounds the previous season.



Table 6.--ORANGE AND GRAPEFRUIT PRODUCTS: U.S. exports by kind, to general and specific areas, 1961-62 to 1963-64 1/

Year and Market Area	Orange Juice			Grapefruit Juice			Blended Juices	Grapefruit Sections
	Single- strength	Concentrate		Single- strength	Concentrate			
		Hot pack	Frozen		Hot pack	Frozen		
		1,000 cases	1,000 U.S. gal.		1,000 cases	1,000 U.S. gal.		
1961-62:								
Canada.....	1,831	176	3,918	961	19	147	648	59
Europe.....	580	618	865	1,134	114	93	93	285
Far East.....	76	325	17	19	1	1	5	6
Middle East.....	34	3	36	11	8	10	8	2
Africa.....	17	5	5	11	2	1	2	1
Caribbean.....	41	2	38	6	10	3	10	1
Latin America.....	29	19	26	23	19	9	5	(2/)
Other areas.....	1	---	---	(2/)	---	---	11	---
Total.....	2,609	1,148	4,905	2,165	173	264	782	354
1962-63:								
Canada.....	1,540	200	2,741	848	6	164	641	55
Europe.....	229	469	761	761	108	8	55	148
Far East.....	35	260	35	14	(2/)	1	4	4
Middle East.....	31	5	20	12	3	8	50	2
Africa.....	16	2	1	7	1	1	2	(2/)
Caribbean.....	26	11	33	5	(2/)	4	40	1
Latin America.....	11	35	11	9	20	7	5	1
Other areas.....	(2/)	---	(2/)	(2/)	---	---	---	---
Total.....	1,888	982	3,602	1,656	138	193	797	211
1963-64:								
Canada.....	950	235	2,163	546	18	157	412	88
Europe:								
Austria.....	---	5	---	1	---	---	---	---
Belgium-Luxembourg.....	22	9	6	23	4	1	2	2
Denmark.....	3	1	(2/)	3	22	---	1	(2/)
France.....	2	---	1	91	---	(2/)	2	(2/)
Germany, W.....	8	140	21	11	14	---	(2/)	1
Ireland.....	1	32	(2/)	4	---	---	---	10
Italy.....	7	---	---	12	---	---	(2/)	1
Netherlands.....	1	105	52	7	4	7	(2/)	1
Norway.....	5	1	3	2	---	---	(2/)	---
Sweden.....	10	20	76	10	7	1	8	1
Switzerland.....	4	33	41	15	84	2	---	4
United Kingdom.....	1	---	3	38	1	---	---	28
Other.....	1	2	---	1	4	---	2	1
Total.....	65	348	203	218	140	11	15	49
Far East:								
Malaysia.....	10	127	14	9	---	---	(2/)	2
Hong Kong.....	10	50	10	4	1	---	2	1
Japan.....	10	---	1	5	---	1	(2/)	2
New Zealand.....	---	---	---	---	---	---	1	(2/)
Philippines.....	4	159	1	---	(2/)	---	1	(2/)
Other.....	7	13	9	1	1	(2/)	3	1
Total.....	41	349	35	19	2	1	7	6
Middle East:								
Bahrain.....	2	---	1	1	---	---	(2/)	(2/)
Kuwait.....	4	(2/)	(2/)	2	---	(2/)	1	(2/)
Saudi Arabia.....	6	---	2	1	(2/)	(2/)	(2/)	1
Israel.....	---	---	(2/)	---	6	3	---	(2/)
Other.....	12	1	5	2	(2/)	2	8	1
Total.....	24	1	8	6	6	5	9	2
Africa:								
Algeria.....	---	---	---	---	---	---	---	---
So. Africa, Rep. of.....	(2/)	---	---	---	---	---	---	---
Other.....	17	4	2	6	1	---	2	1
Total.....	17	4	2	6	1	---	2	1
Caribbean:								
Bahamas.....	16	12	12	1	1	2	3	1
Bermuda.....	4	2	6	2	---	1	2	(2/)
Cuba.....	---	---	---	---	---	---	---	---
Netherlands Antilles.....	10	2	3	2	---	2	1	(2/)
Other.....	2	(2/)	1	(2/)	---	---	1	---
Total.....	32	16	22	5	1	5	7	1
Latin America:								
Canal Zone.....	---	---	---	---	---	---	2	---
Mexico.....	11	3	---	2	16	(2/)	3	(2/)
Venezuela.....	---	5	30	---	---	---	(2/)	---
Other.....	2	4	1	9	1	2	2	---
Total.....	13	12	31	11	17	2	7	(2/)
Other areas.....	(2/)	---	---	---	(2/)	---	---	---
Total all markets.....	1,142	965	2,464	811	185	181	459	147

1/ Year beginning November 1. 2/ Less than 500 units.

Oranges and tangerines. U. S. exports in 1963-64 totaled 5.1 million boxes compared with 4.4 million boxes in 1962-63 and 4.9 million boxes in 1961-62. Larger winter exports to Canada and the Far East were major factors in the increase.

Table 3 .--ORANGES AND TANGERINES: U. S. exports by season and destination, November 1, 1961-October 31, 1964

Destination	Winter exports			Summer exports		
	Nov. 1 - Apr. 30			May 1 - Oct. 31		
	1961-62	1962-63	1963-64	1962	1963	1964
	1,000 boxes of 84 lb.			1,000 boxes of 84 lb.		
Canada.....	1,762	1,342	2,003	1,263	1,113	1,218
Europe:						
Belgium.....	4	4	20	225	247	234
Denmark.....	--	--	3	7	13	3
Finland.....	--	1	(1/)	--	1	1
France.....	1	--	(1/)	62	62	72
Germany, W.....	--	4	--	14	16	(1/)
Ireland.....	1	--	1	1	1	2
Netherlands.....	47	6	14	593	537	416
Norway.....	4	--	21	62	65	49
Sweden.....	--	(1/)	14	1	48	21
Switzerland.....	2	--	--	--	1	1
United Kingdom.....	4	6	1	30	8	1
Total.....	63	21	74	995	999	800
Far East:						
Malaysia.....	11	3	13	43	53	17
Hong Kong.....	255	193	345	407	340	367
New Zealand.....	--	(1/)	19	--	--	(1/)
Philippines.....	15	12	18	18	22	20
Other 2/.....	9	9	15	11	16	20
Total.....	290	217	410	479	431	424
Caribbean:						
Bahamas.....	5	5	5	10	4	6
Bermuda.....	3	2	1	1	(1/)	1
Netherlands Antilles.....	24	10	9	29	2	5
Other.....	--	--	(1/)	--	(1/)	(1/)
Total.....	32	17	15	40	6	12
Latin America:						
Mexico.....	16	34	69	52	63	80
Other.....	1	1	(1/)	1	(1/)	(1/)
Total.....	17	35	69	53	63	80
Other markets 3/.....	--	4/104	2	--	7	3
Total all markets..	2,164	1,736	2,573	2,830	2,619	2,537

1/ Less than 500 boxes. 2/ India, Indonesia, Japan, Korea, Macao, Nansei and Nanpo Islands, and Viet-Nam, Laos, and Cambodia. 3/ Algeria, Congo, Aden, Bahrein, Saudi Arabia, and other Africa. 4/ Includes 101,000 boxes to East Germany.



Grapefruit. U. S. exports in 1963-64 totaled 2.2 million boxes compared with 2 million boxes in 1962-63 and 2.9 million boxes in 1961-62. Winter exports to Canada and summer exports to Western Europe both showed increases.

Table 4 .--GRAPEFRUIT, FRESH: U. S. exports by season and destination, September 1, 1961 - August 31, 1964

Destination	Winter exports			Summer exports		
	Sept. 1 - Feb. 28			Mar. 1 - Aug. 31		
	1961-62	1962-63	1963-64	1962	1963	1964
	1,000 boxes of 78 lbs.			1,000 boxes of 78 lbs.		
Canada.....	912	774	937	950	546	528
Europe:						
Belgium-Luxembourg....	14	10	14	52	34	42
Denmark.....	2	1	1	12	6	12
France.....	55	50	68	147	124	177
Germany, W.....	64	54	38	82	28	57
Ireland.....	1	1	--	10	3	2
Netherlands.....	126	116	77	208	130	144
Norway.....	2	2	4	7	2	6
Sweden.....	25	15	28	17	8	20
Switzerland.....	2	2	1	21	8	2
United Kingdom.....	18	9	7	124	23	31
Other.....	4	7	6	2	5	7
Total.....	313	267	244	682	371	500
Far East:						
Malaysia.....	1	2	(1/)	2	1	2
Hong Kong.....	1	1	2	4	2	2
Japan.....	8	1	8	6	10	16
Other.....	(1/)	(1/)	--	(1/)	1	(1/)
Total.....	10	4	10	12	14	20
Caribbean:						
Bahamas.....	(1/)	(1/)	1	(1/)	1	1
Netherlands Antilles..	1	2	2	2	1	1
Other.....	(1/)	(1/)	(1/)	1	(1/)	(1/)
Total.....	1	2	3	3	2	2
Mexico.....	3	2	3	5	3	2
Other markets.....	1	1	--	--	3	(1/)
Total all markets.....	1,240	1,050	1,197	1,652	939	1,052

1/ Less than 500 boxes.

Lemons. U. S. lemon exports in 1963-64 totaled 2.9 million boxes, the same sustained high level as 1962-63, and 800,000 boxes larger than 1961-62. A small decline in summer exports to Western Europe was offset by larger sales to the Far East.

Table 5.--LEMONS AND LIMES: U. S. exports by season and destination  
November 1, 1961 - October 31, 1964

Destination	Winter exports			Summer exports		
	Nov. 1 - Apr. 30			May 1 - Oct. 31		
	1961-62	1962-63	1963-64	1962	1963	1964
	1,000 boxes of 76 lbs.			1,000 boxes of 76 lbs.		
Canada.....	195	204	206	221	227	196
Europe:						
Belgium-Luxembourg..	131	52	55	77	183	146
Denmark.....	16	10	12	14	52	31
Finland.....	14	13	25	4	10	7
France.....	244	105	196	139	654	476
Germany, W.....	123	15	10	91	299	279
Iceland.....	3	2	2	2	2	3
Ireland.....	(1/)	3	1	3	5	2
Netherlands.....	191	87	125	129	383	301
Norway.....	31	16	23	21	30	30
Sweden.....	18	18	28	26	65	47
Switzerland.....	--	1	1	10	11	4
United Kingdom.....	114	31	23	55	158	98
Other.....	12	--	--	65	14	1
Total.....	897	353	501	636	1,866	1,425
Far East:						
Hong Kong.....	16	16	18	16	23	26
New Zealand.....	--	2	1	--	--	--
Japan.....	56	54	79	50	73	351
Other.....	3	1	5	1	2	3
Total.....	75	73	103	67	98	380
Caribbean.....	1	2	(1/)	2	2	2
Mexico.....	36	35	33	49	60	52
Other markets.....	--	1	(1/)	--	(1/)	(1/)
Total all markets...	1,204	668	843	975	2,253	2,055

1/ Less than 500 boxes.



Table 7 .--LEMON JUICE AND ESSENTIAL OIL OF ORANGE AND LEMON:  
United States trade, crop years, 1958-59 to 1963-64 <sup>1/</sup>

Year and area	Lemon juice		Orange oil		Lemon oil	
	Exports	Imports	Exports	Imports	Exports	Imports
	Single-strength equivalent <sup>2/</sup> 1,000 U.S. gal.		1,000 pounds		1,000 pounds	
1958-59:						
Canada.....	307	--	45	--	21	5
Other areas.	1,772	<sup>3/</sup> 1,691	2,264	77	254	82
Total.....	2,079	1,691	2,309	77	275	87
1959-60:						
Canada.....	335	--	48	--	97	13
Other areas.	1,919	<sup>3/</sup> 174	2,363	65	507	67
Total.....	2,254	174	2,411	65	604	80
1960-61:						
Canada.....	361	--	69	--	128	10
Other areas.	1,578	<sup>3/</sup> 160	2,694	79	618	172
Total.....	1,939	160	2,763	79	746	182
1961-62:						
Canada.....	379	--	68	--	56	18
Other areas.	1,497	838	3,069	130	564	292
Total.....	1,876	838	3,137	130	620	310
1962-63:						
Canada.....	325	--	55	--	38	23
Other areas.	709	2,385	2,946	135	199	726
Total.....	1,034	2,385	3,001	135	237	749
1963-64:						
Canada.....	263	--	140	6	203	1
Other areas.	616	964	3,022	114	227	263
Total.....	879	964	3,162	120	430	264

<sup>1/</sup> Year beginning November 1.

<sup>2/</sup> Includes single-strength and preserved, hot pack, and frozen concentrate expressed in single-strength equivalents.

<sup>3/</sup> Italy.

Table 8 .--ORANGES: U. S. imports by origin, 1962-63 and 1963-64 1/

Origin	1962-63	1963-64
	<u>1,000 boxes of 70 lb.</u>	<u>1,000 boxes of 70. lb.</u>
Brazil <u>2/</u> .....	1	--
Canada.....	--	1
Dominican Rep.....	( <u>3/</u> )	8
Haiti.....	4	171
Israel.....	51	60
Italy.....	1	( <u>3/</u> )
Jamaica.....	15	1
Japan <u>4/</u> .....	4	20
Mexico.....	987	1,854
Spain.....	4	6
Sweden.....	--	2
Taiwan.....	( <u>3/</u> )	1
Total.....	1,067	2,124

1/ Crop years, Nov. 1-Oct. 31.

2/ Imports into Alaska.

3/ Less than 500 boxes.

4/ Probably ship's stores; imports into the United States are prohibited by quarantine.

U. S. Bureau of the Census.

Table 9.-- ORANGE AND LIME JUICE: U. S. imports, monthly, 1962-64

Month	Orange juice			Lime juice					
	Concentrated <u>1/</u>			Concentrated <u>2/</u>			Single-strength		
	1962	1963	1964	1962	1963	1964	1962	1963	1964
	<u>1,000</u>	<u>1,000</u>	<u>1,000</u>	<u>1,000</u>	<u>1,000</u>	<u>1,000</u>	<u>1,000</u>	<u>1,000</u>	<u>1,000</u>
	<u>gal.</u>	<u>gal.</u>	<u>gal.</u>	<u>gal.</u>	<u>gal.</u>	<u>gal.</u>	<u>gal.</u>	<u>gal.</u>	<u>gal.</u>
January...	62	( <u>3/</u> )	523	( <u>3/</u> )	81	14	73	16	37
February..	597	364	1,260	--	15	--	32	13	37
March.....	304	198	832	--	1	--	32	46	179
April.....	148	374	2,346	41	( <u>3/</u> )	( <u>3/</u> )	21	47	57
May.....	--	200	407	31	6	1	115	32	55
June.....	--	729	388	9	--	( <u>3/</u> )	46	63	38
July.....	( <u>3/</u> )	541	636	( <u>3/</u> )	( <u>3/</u> )	1	44	70	32
August....	--	100	881	57	90	44	44	45	47
September.	--	70	180	--	54	--	57	43	49
October...	--	1,312	116	--	--	6	82	42	47
November..	--	227	578	11	3	( <u>3/</u> )	27	43	50
December..	--	784	710	--	19	51	40	28	29
Total..	1,111	4,899	8,857	149	269	117	613	488	657

1/ For 1962 through August 1963, citrus juice concentrate unspecified, excluding lemon and lime, expressed in single-strength equivalent. (Mostly orange, but may include some other citrus juice.) Beginning September 1963, orange juice only.

2/ Lime juice concentrate, expressed in single-strength equivalent.

3/ Less than 500 gallons.



UNITED STATES DEPARTMENT OF AGRICULTURE

WASHINGTON, D. C. 20250

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## WINTER CITRUS PROSPECTS

## FOR COMPETITION IN EUROPE

### SUMMARY

Oranges and tangerines (November 1, 1964-June 30, 1965): The total Mediterranean crop is estimated at 144 million boxes, about  $1\frac{1}{2}$  million boxes smaller than last season's supplies after frost losses in Greece and Israel. Exports to Western Europe, however, may exceed 1963-64 by several million boxes.

Both the size of the crop and the larger supplies of late oranges in Spain and Morocco are expected to result in a highly competitive orange market in Europe throughout the winter season, with little opportunity for U. S. exports.

Grapefruit (September 1, 1964-June 30, 1965): Competing winter grapefruit supplies in the Mediterranean and the West Indies are expected to be slightly higher than last season. Record supplies of 6.2 million boxes are expected to result in exports of over 3 million boxes to Europe for the first time.

This represents an expected increase in competitive exports of about 130,000 boxes; however, increasing European use of grapefruit will probably result in higher U. S. exports to meet the growing demand.

Lemons (October 1, 1964-May 31, 1965): Mediterranean lemon supplies are estimated at 22.4 million boxes, slightly larger than last season.

Total exports are estimated at 11 million boxes. While total supplies appear to be about the same, this crop is expected to result in keener competition for U. S. lemons. Exports from Italy and Spain are expected to be about the same as last season--October-May. However, the much larger Spanish crop is expected to result in greatly increased total competitive supplies, June-September. Lemon prices in Europe, June-September, are expected to be lower than for the past two seasons.



Table 1.--ORANGES AND TANGERINES: Production 1960-64, and exports to Eastern and Western Europe from principal suppliers competing with United States, winter seasons 1960-61 to 1964-65

Origin	Production <sup>1/</sup>				
				Prelim.	Estimated
	1960	1961	1962	1963	1964
	Mil. boxes	Mil. boxes	Mil. boxes	Mil. boxes	Mil. boxes
Algeria.....	6.7	8.0	10.0	10.0	9.0
Cyprus.....	1.0	2.0	1.3	1.9	1.4
Greece.....	6.4	7.2	7.0	<u>2/</u> 5.0	7.5
Israel.....	11.7	13.0	17.9	<u>2/</u> 16.0	20.0
Italy.....	27.2	29.2	26.1	33.9	30.0
Morocco.....	14.1	14.2	14.0	18.0	18.8
Spain.....	48.2	52.1	<u>2/</u> 35.0	58.3	55.1
Tunisia.....	2.3	2.4	2.0	2.2	2.0
Total Mediterranean:	117.6	128.1	113.3	145.3	143.8
Mexico.....	21.5	<u>3/</u> 14.0	24.8	25.2	24.0
Total winter.....	139.1	142.1	138.1	170.5	167.8
EXPORTS TO EASTERN AND WESTERN EUROPE <sup>4/</sup>					
				Prelim.	Estimated
	1960-61	1961-62	1962-63	1963-64	1964-65
Algeria.....	6.7	8.4	8.7	5.5	5.0
Cyprus.....	.7	1.0	.7	1.2	1.1
Greece.....	1.0	1.6	1.9	1.1	1.8
Israel.....	6.7	9.0	10.2	8.7	12.0
Italy.....	6.2	6.8	5.3	7.5	7.0
Morocco.....	10.5	10.6	9.3	13.0	13.1
Spain.....	28.3	36.8	20.0	39.6	39.0
Tunisia.....	1.2	1.1	.9	1.0	1.0
Total Mediterranean:	61.3	75.3	57.0	77.6	80.0
Mexico <sup>5/</sup> .....	.2	.2	--	--	--
Total winter.....	61.5	75.5	57.0	77.6	80.0

<sup>1/</sup> Year of bloom, March-April. Boxes of 70 pounds.

<sup>2/</sup> Unofficial estimate showing frost losses. (Revised)

<sup>3/</sup> Estimated harvest after January freeze.

<sup>4/</sup> Crop year, November-October.

<sup>5/</sup> Computed--total Mexican exports less U. S. and Canadian imports from Mexico.

Table 2.--LEMONS: Production 1960-64, and exports to Europe from principal suppliers competing with the United States, winter seasons 1960-61 to 1964-65

Origin	Production <sup>1/</sup>					Prelim. : Estimated
	1960	1961	1962	1963	1964	
	Mil. : boxes	Mil. : boxes	Mil. : boxes	Mil. : boxes	Mil. : boxes	
Algeria.....	0.2	0.2	0.2	0.2	0.2	0.2
Cyprus.....	.2	.4	.4	.4	.4	.3
Greece.....	2.3	2.5	2.6	<sup>4/</sup> 1.5	2.4	2.4
Israel.....	.6	.7	1.0	.9	.9	.9
Italy.....	9.8	14.3	10.4	14.1	13.3	13.3
Morocco.....	.3	.2	.2	.3	.3	.3
Spain.....	2.5	2.7	1.6	1.7	3.2	3.2
Tunisia.....	.4	.5	.4	.5	.4	.4
Turkey.....	1.6	1.5	1.6	1.7	1.4	1.4
Total.....	17.9	23.0	18.4	21.3	22.4	

Italy only:

Winter (Oct. 1-May 30)....	8.8	13.2	9.4	12.5	11.6	
Summer (June 1-Sept. 30)..	1.0	1.1	1.0	1.6	1.7	

EXPORTS TO EASTERN AND WESTERN EUROPE <sup>2/</sup>

	Prelim. : Estimated				
	1960-61	1961-62	1962-63	1963-64	1964-65
Algeria.....	0.10	0.10	0.09	0.08	0.07
Cyprus.....	.09	.20	.14	.19	.16
Greece.....	.92	1.14	1.14	.89	1.00
Israel.....	.22	.25	.44	.35	.36
Italy.....	5.15	6.31	5.31	7.99	7.50
Morocco.....	.11	.09	.09	.11	.09
Spain <sup>3/</sup> .....	.90	1.35	.47	.98	1.50
Tunisia.....	.10	.13	.17	.15	.18
Turkey.....	.32	.18	.34	.33	.30
Total.....	7.91	9.75	8.19	11.07	11.16

EXPORTS TO EASTERN AND WESTERN EUROPE FROM ITALY ONLY (WINTER AND SUMMER)

Winter:

Oct. 1-Jan. 31.....	2.14	2.67	2.27	2.72	2.40
Feb. 1-May 31.....	3.01	3.64	2.42	3.77	3.50
Total Oct.-May.....	5.15	6.31	4.69	6.49	5.90

Summer:

June 1-Sept. 30.....	1.80	1.61	.62	<sup>5/</sup> 1.50	1.60
Total.....	6.95	7.92	5.31	7.99	7.50

<sup>1/</sup> Year of bloom March-April. Boxes of 76 pounds. <sup>2/</sup> Oct. 1-May 31, except as indicated, includes exports to USSR. <sup>3/</sup> Nov.-Oct. <sup>4/</sup> Unofficial estimate showing frost losses. <sup>5/</sup> Preliminary--June and July only.



Table 3.--GRAPEFRUIT: Production 1960-64, and exports to Eastern and Western Europe from principal suppliers competing with United States, winter seasons 1960-61 to 1964-65

Origin	Production <sup>1/</sup>				
				Prelim.	Estimated
	1960	1961	1962	1963	1964
	Mil. boxes	Mil. boxes	Mil. boxes	Mil. boxes	Mil. boxes
Algeria.....	0.14	0.12	0.10	0.10	0.10
British Honduras.....	.26	.11	.23	.32	.32
Cuba.....	.20	.20	.20	.05	.10
Cyprus.....	.20	.34	.35	.37	.35
Israel.....	1.73	2.05	2.71	<sup>6/</sup> 3.45	3.25
Jamaica.....	.38	.53	.60	.69	.79
Morocco.....	.37	.41	<sup>6/</sup> .35	.35	.37
Spain.....	.11	.11	.17	.07	.12
Trinidad & Tobago.....	.60	.80	.57	.60	.80
Total.....	3.99	4.67	5.28	6.00	6.20
EXPORTS TO EASTERN AND WESTERN EUROPE <sup>2/</sup>					
				Prelim.	Estimated
	1960-61	1961-62	1962-63	1963-64	1964-65
Algeria.....	0.06	0.05	0.07	0.06	0.05
British Honduras.....	.05	--	--	.03	.05
Cuba <sup>3/</sup> .....	.10	.05	.01	--	--
Cyprus.....	.22	.25	.22	.31	.30
Israel <sup>4/</sup> .....	1.17	1.35	1.64	2.01	2.20
Jamaica.....	.05	.07	.08	.17	.20
Morocco.....	.23	.22	.16	.16	.17
Spain.....	.05	.06	.06	.05	.08
Trinidad & Tobago <sup>5/</sup> .....	.19	.29	.17	.15	.20
Total.....	2.12	2.34	2.41	2.94	3.25

- <sup>1/</sup> Year of bloom, Feb.-April. Boxes of 80 pounds. <sup>2/</sup> September-June.  
<sup>3/</sup> Total exports. <sup>4/</sup> Israeli shipping boxes of 81.6 pounds net.  
<sup>5/</sup> Calendar years; chiefly to the United Kingdom. <sup>6/</sup> Unofficial estimate.

## U. S. EXPORT OUTLOOK

### Fresh Citrus

Increased Mediterranean supplies of better quality export oranges will restrict U. S. winter orange exports to Europe. However, a slightly larger U. S. winter orange crop is expected to result in increased exports to Canada, and total 1964-65 U. S. winter orange exports may be larger than last year.

Continued shortages of total winter oranges in Florida are expected to result in record imports from Mexico, Israel, and several minor areas for sale fresh or for processing.

Total grapefruit exports are expected to increase because of growing foreign demand.

Total lemon exports and export prices are expected to decline because of increased Spanish supplies for summer export to European markets. Increased sales to the Far East are not expected to compensate for the loss of sales in Europe.

### Citrus Products

U. S. exports of orange oil and lemon oil, hot pack concentrated orange juice and lemon juice are expected to be sustained at about the 1963-64 season levels, considered fairly normal. Exports of all other citrus products are expected to remain at the low levels of the past season. Competitors will continue to establish markets in Western Europe and Canada.

Increased foreign processing capacity will make larger competitive product supplies available.

Continued shortages in Florida of both oranges and orange juice are expected to result in record U. S. imports of orange juice, possibly as much as 10 million gallons, single-strength equivalent. Nearly all of the imported juice will be imported in bulk (50 gallon drums) for blending with U. S. juice sold under U. S. brands. This volume of orange juice imports is expected to decline as orange production is restored in Florida in the next few years.

Lemon juice imports might also increase sharply if attracted by higher U. S. lemon juice prices. Large quantities of lemon juice are still reported to be in storage in Sicily.

### ITALY

In Sicily, November storms damaged the orange crop, and although no first-hand appraisal of the damage has been reported, the quantity of export fruit available has probably been somewhat reduced. Reports indicate little or no damage was done to either lemon groves or fruit.



The winter lemon crop is reportedly somewhat below last year's big crop, but good supplies of product lemons should be available.

Trade sources report that as of November 1964 Sicilian lemon growers were not satisfied with the price of \$72 per metric ton for export fruit and \$40 to \$48 per metric ton for product lemons.

Export trade in fresh lemons in November was reported slow.

In November 1964, supplies of lemon oil in storage in Italy may have totaled 300,000 pounds, trade sources indicate. A good part of this total is reported to be poorer grade oil made from verdelli lemons. The price of unadulterated lemon oil in November was reported as 1,800 lire a Sicilian pound, or about \$4.80 per pound, c.i.f. New York. Demand was reported slow. However, prices are not expected to decline much below the November level.

Large quantities of lemon juice are reportedly remaining in storage in Sicily. Much is now old and of poor quality, however, enough salable juice remains on hand to supply export needs. Juice prices remain low, and in October 1964 processors were paying only \$0.05 to \$0.08 per U. S. gallon for field-produced lemon juice.

#### SPAIN 1/

The 1964-65 orange crop is expected to total 1,643,120 metric tons, 5.8 percent below 1963-64 but 10.6 percent above average. The Valencia late crop this year is one of the largest on record, namely, 68,970 metric tons, 132.2 percent above 1963-64. Also rising in numbers are Whites (selected and common, both), Vernas and bitter oranges.

The lemon crop this year, estimated at 109,940 metric tons, is a record one, 85.7 percent above 1963-64 and 56.7 percent above average. Quality is also reported good, especially in the Verna and Verdelli groups, which account for over 85 percent of the total Spanish lemon crop.

The 1964-65 tangerine crop is expected to total 126,740 metric tons, up 1.3 percent from the 1963-64 crop and 6.1 percent larger than the 1959-63 average. The somewhat smaller "Mandarin" output will be offset by an increase of 34.1 percent in "Satsuma" production.

This year's grapefruit outturn, estimated at 4,200 metric tons, is 68 percent above the reduced 1963-64 crop but 5.1 percent below average.

Reports from the most important citrus producing areas indicate that this year's crop has developed under fairly good conditions. However, high temperatures throughout spring and summer of 1964 as well as scarcity of rains has resulted in some early maturity of the fruit.

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1/ From reports of Edward Quinones, Assistant Agricultural Attache, American Embassy, Madrid, Spain.

# Domestic Consumption, Processing, and Exports

According to official and trade sources, 400,000 to 450,000 metric tons of citrus fruits were consumed in the domestic market during the 1963-64 season. The rising standard of living and a nationwide promotional campaign (to be sponsored by the Spanish Fruit and Vegetable Syndicate) are expected to contribute to expansion of Spanish citrus consumption.

According to the Syndicate, 1963-64 was a record season in citrus processing. The local industry processed some 300,000 metric tons of citrus fruit, 90 to 95 percent of it oranges.

During the 1963-64 season (Nov. 1, 1963-July 5, 1964) Spanish exports of citrus fruits (oranges, tangerines, lemons and grapefruit) totaled an all-time record of 1,319,112 metric tons. This was nearly 100 percent above the preceding season, when over 875,000 metric tons of fruit were either partially damaged or lost through freezes, and 44.5 percent above the 1958-62 average.

SPAIN: Citrus exports by major types of fruit and countries of destination, Nov. 1, 1963-Oct. 31, 1964

Destination	: Oranges	: Tangerines	: Lemons	: Grapefruit	: Total
	: Metric	: Metric	: Metric	: Metric	: Metric
	: tons	: tons	: tons	: tons	: tons
Germany, West.....	: 396,105	: 40,082	: 13,587	: 932	: 450,706
Germany, East.....	: 9,055	: --	: 2,400	: --	: 11,455
Austria.....	: 6,133	: 552	: 2	: 30	: 6,717
Belgium-Luxemburg..	: 83,373	: 8,982	: 12	: 77	: 94,444
Bulgaria.....	: 865	: --	: --	: --	: 865
Canada.....	: 1,415	: --	: --	: --	: 1,415
Czechoslovakia.....	: 2,999	: 4	: 3,771	: --	: 6,774
Denmark.....	: 16,270	: 118	: 27	: 13	: 16,428
Finland.....	: 4,253	: 368	: --	: --	: 4,621
France.....	: 270,306	: 13,684	: 12,517	: 197	: 296,704
Holland.....	: 105,219	: 5,045	: 59	: 30	: 110,353
United Kingdom.....	: 122,357	: 15,012	: 158	: 690	: 138,217
Ireland.....	: 3,669	: 13	: 67	: 13	: 3,762
Iceland.....	: 253	: --	: --	: --	: 253
Norway.....	: 24,230	: 19	: --	: --	: 24,249
Poland.....	: 2,310	: --	: --	: --	: 2,310
Russia.....	: 21,504	: --	: --	: --	: 21,504
Sweden.....	: 45,569	: 3,877	: 100	: --	: 49,546
Switzerland.....	: 63,360	: 13,298	: 1,201	: 226	: 78,085
Other countries....	: 2,701	: 3	: --	: --	: 2,704
Total, 1963-64.	: 1,181,946	: 101,057	: 33,901	: 2,208	: 1,319,112
Total, 1962-63..	: 583,273	: 58,622	: 16,159	: 1,999	: 660,053
Percent change...	: 102.6	: 72.3	: 109.7	: 10.4	: 99.8

Source: Spanish Fruit and Vegetable Syndicate.



Spanish shipments of citrus fruits to the Communist Bloc except Yugoslavia, in 1963-64 totaled 20,539 metric tons, up 53.5 percent from the amount shipped in the preceding season, and 18.4 percent above the 1961-62 year.

The 1963-64 export season, although a record one in terms of quantity of fruit shipped abroad, was deeply disappointing pricewise, to both producers and exporters. A nearly continuous slump of prices throughout the season resulted in considerable losses to many exporters. Furthermore, Spain faced strong competition from other citrus producers, aggravated by mounting complaints of small sizes, sour taste, etc.

The sale of Spanish citrus to the European Economic Community (EEC) may be adversely affected in the 1964-65 season by the EEC custom duty, namely 13 percent for "outer" suppliers as compared with only 7 percent for Italy, an "inner" exporter. Another deterrent to the expansion of citrus exports abroad is the ban on artificial coloration recently enacted by the British Government. Only small quantities of very early oranges are colored.

It seems, however, that Spain is determined to maintain her present markets by (a) stricter official control over the quality of citrus for export; (b) simplification of customs clearance by the establishment of interior offices in production areas; and (c) a publicity drive, with cost estimated at nearly \$1 million in West Germany, the United Kingdom, Benelux, Austria, the Scandinavian countries and Switzerland.

#### MOROCCO 1/

The citrus industry of Morocco broke all records in the 1963-64 season, both for production--630,490 metric tons--and for exports--474,940 metric tons. This represents increases over the previous year of 24.8 percent and 31.2 percent, respectively.

Price problems, particularly in the EEC area, beset the industry and resulted in a lowered per-ton return from exported fruit. A concerted effort by producers and shippers will be made to meet these changed conditions.

The outlook for 1964-65 is for a modest increase in production and a hoped-for increase in exports to over 500,000 metric tons.

Renewed advertising effort will be made both in Europe and in Morocco to secure increased consumption of expected larger production.

While new acreages of trees still continue to come into bearing, production estimates are likely to show annual increases. This increase is leveling off, however, as fewer new plantings are made because of the belief that a maximum market in the Mediterranean area may have already been reached. The experience year-to-year in Europe discounts this belief, however.

Some drop may occur temporarily in Moroccan production as a result of the takeover of former European orchards and management under governmental supervision.

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1/ From a report by W. Gordon Loveless, Agricultural Attache, American Embassy, Rabat, Morocco.

The 1964-65 crop is estimated as follows:

<u>Variety</u>	<u>Est. production</u> <u>1,000 metric tons</u>	<u>Est. exportable</u> <u>supplies</u> <u>1,000 metric tons</u>
Clementines	46	40
Mandarines	19	15
Oranges:		
Navels	205	160
Seedless oranges	18	10
Blood oranges	80	50
Seeded oranges	2	2
Valencias	226	200
	<hr/>	<hr/>
Total oranges	521	422
	<hr/>	<hr/>
Grapefruit	13	6
Lemons	9	3

### Foreign Trade

Exports to June 30, 1964, were 474,000 metric tons, an increase of 31.2 per cent over the 1962-63 season.

Quantities consumed on the domestic market represent 24.7 percent of the production, about 35,000 tons of oranges and 5,000 tons of lemons for processing, and 115,000 tons of lemons as fresh fruit.

Morocco exported citrus to 20 countries during the 1963-64 season, partly through an effort to find permanent new outlets. Sales were made on the Canadian market for the first time.

Europe constitutes the nearest market, and principal one, for Moroccan citrus. The only sales last season outside Europe were made to several other African countries (8,641 tons), and to Canada (2,242 tons). In total, 98 percent of sales were to European destinations.

Western Europe absorbed 87.6 per cent as against 84.3 percent in 1962-63, and 90 percent in 1961-62. The EEC is the principal client with 367,562 tons, or 80.6 percent of total exports of citrus compared with 78.5 percent in 1962-63, and 81.6 percent in 1961-62.

Morocco supplies about 21.9 percent of the citrus needs of the Common Market.

### Citrus Juices

Table V of the appendix shows over 9,000 metric tons of citrus juice exports, about 2,000 tons above the previous year. Prospects are developing for additional processing of citrus for juice and frozen concentrate.



MOROCCO: Citrus juice exports by country of destination

Destination	1961-62 <sup>1/</sup>	1963-64 <sup>1/</sup>
Europe, Western	Metric tons	Metric tons
EEC		
Belgium-Luxembourg.....	30	203
France .....	4,220	7,129
Germany .....	529	460
Italy .....	--	--
Netherlands .....	139	138
Non-EEC		
Denmark.....	2	--
Finland.....	5	--
Norway.....	3	19
Sweden.....	12	24
United Kingdom.....	77	143
Spain.....	--	336
Canada.....	--	495
Africa.....	176	279
Far East.....	8	2
United States.....	--	40
Others.....	17	65
Total.....	5,218	9,333

<sup>1/</sup> Seasonal exports, July 1-June 30.

GREECE <sup>1/</sup>

Production, 1963 and 1964, and Anticipated Future Output

The 1964 orange crop is expected to reach the alltime record figure of 256,988 metric tons, 26 percent above 1963 production.

The 1964 lemon crop, presently estimated at 83,325 metric tons, is close to the 1963 estimate of 83,645 metric tons, and only 3 percent over the 1959-63 5-year average.

The 1963 orange and lemon crops were hit by frosts in late January and early February, 1963. Damage was most severe in the Arta area, where about 30,000 metric tons of fruit was damaged. Part of this fruit was salvaged for juice. The only areas not hit by frost were at Chania in Crete and on the other Aegean Islands.

Because of continued increased plantings of new trees, and the large numbers of trees that come annually to full bearing, it is expected that the volume of citrus produced will keep increasing. Within a few years, it is expected that total citrus production will be double. Oranges will contribute the larger portion of the anticipated increase.

<sup>1/</sup> From a report by Costas Athanassiadis, submitted by John D. Motz, Agricultural Attache, American Embassy, Athens, Greece.

Production of Greek citrus by kinds, during 1962, 1963, and 1964 follows:

<u>Fruit</u>	<u>1962 1/</u>	<u>1963 2/</u>	<u>1964 3/</u>
	- - -	<u>Metric tons</u>	- - -
Oranges	213,065	203,644	256,988
Lemons	90,835	83,645	83,325
Tangerines	16,522	19,386	22,829
Bitter oranges	1,649	2,042	1,496
Citrons	1,722	1,952	1,802
Total	323,783	310,669	366,440

1/ Revised estimates accepted as final. 2/ Revised estimates subject to further revision. 3/ Preliminary estimates and forecasts.

Source: Greek Ministry of Agriculture.

### Fruit Exports

Total 1963-64 exports of citrus (oranges-lemons-tangerines) amounted to 66,461 metric tons and were 32.6 percent under the total 1962-63 exports. The frosts that occurred in January and February 1964, were responsible for reduction in total volume of citrus exported during the past season.

As in past years, the total share of the Soviet Bloc trade totaled 75.1 percent. About 88.3 percent of total lemon exports in 1963-64 were bought by Soviet Bloc countries. The share of Soviet Bloc countries in total Greek citrus exports is expected to continue high.

It is believed that because of the current large volume of production, price levels will encourage increased exports. Present indications are that exports might reach 95,000 metric tons.

On November 19, 1964, the Ministerial Economic Committee decided to subsidize citrus fruit exports as follows:

	<u>Dols. per short ton</u>
Common oranges	\$ 6.00
Navel oranges	9.00
Tangerines	9.00
Lemons	12.00
Oranges for the production of juices for export	4.50

It was also decided that a Committee would be set up with representatives from the Ministries of Commerce and Agriculture, the Bank of Greece, the Cooperatives, and the exporters which will review the citrus export contracts to be signed to see whether quoted prices are within accepted international price margins at the time the contract is negotiated.



The Committee also announced that as of November 25 minimum prices at which exports of lemons would be approved are \$102 per metric tons, f.o.b. for graded lemons and \$97 per metric tons, f.o.b. for non-graded shipments.

GREECE:--Exports of fresh citrus fruit by country of destination,  
1963-64 marketing year

Country of Destination :	Oranges	Lemons	Tangerines
:	1,000	1,000	1,000
:	<u>Metric tons</u>	<u>Metric tons</u>	<u>Metric tons</u>
EEC countries:			
Germany, West.....	1	<u>1/</u>	2
France.....	--	1	--
Netherlands.....	<u>1/</u>	--	<u>1/</u>
Other EEC.....	--	--	--
Sub-total EEC.....	1	1	2
Soviet Bloc countries:			
USSR.....	14	13	--
Germany, East.....	6	3	<u>1/</u>
Hungary.....	1	1	<u>1/</u>
Czechoslovakia.....	1	5	1
Poland.....	<u>1/</u>	3	--
Rumania.....	--	<u>1/</u>	--
Bulgaria.....	--	2	--
Sub-total Soviet Bloc:	22	27	1
Other countries:			
Austria.....	8	<u>1/</u>	1
Yugoslavia.....	2	2	--
United Kingdom.....	--	<u>1/</u>	--
Switzerland.....	--	--	<u>1/</u>
Saudi Arabia.....	<u>1/</u>	--	--
Aden.....	<u>1/</u>	--	--
Sub-total other countries.....	10	3	1
Grand total.....	33	31	4

1/ Less than 500 metric tons.

Source: Ministry of Agriculture.

Production and Exports of Citrus Products

Further increases in the production of citrus juices are expected during the coming 1964-65 season.

For the 1960-61 processing season through 1963-64, output of citrus juices 1/ by kind, follows:

Kind of Juice	: 1960-61	: 1961-62	: 1962-63	: 1963-64 <u>2/</u>
	: <u>Metric tons</u>	: <u>Metric tons</u>	: <u>Metric tons</u>	: <u>Metric tons</u>
Orange.....	: 12,976	: 14,883	: 20,050	: 23,000
Lemon.....	: 836	: 2,085	: 1,136	: 2,000
Tangerine.....	: 15	: 75	: --	: --
Total.....	: 13,827	: 17,043	: 21,186	: 25,000

1/ Includes all juices, single strength equivalent. 2/ Indicative estimates.

Source: Ministry of Agriculture.

A gradual annual increase in the volume of citrus juices exported is observed in recent years. This trend is expected to continue.

Total volume of 1963 exports of essential oils of citrus exceeded 25 metric tons. The January-July 1964 exports of essential oils of citrus also amounted to about 25 metric tons. Further exports are anticipated.

For the 1960-61 season through 1962-63, exports of citrus juices 1/ were as follows:

<u>Kind of Juice</u>	<u>1960-61</u>	<u>1961-62</u>	<u>1962-63</u>
	- - <u>Metric tons</u> - -		
Orange	6,164	4,668	8,762
Lemon	491	781	504
Total	<u>6,655</u>	<u>5,449</u>	<u>9,266</u>

1/ Includes all juices, single strength equivalent.  
Source: Greek Ministry of Agriculture.

#### TURKEY 1/

Best indications are that the 1964-65 citrus crop will be about 10-15 percent lower than the previous year's since last winter temperatures in main citrus-producing areas went down 8°-10°C. below zero for a few days and damaged the crop. It was the coldest winter in 10 years for these areas. Most nurseries and young trees were frozen, as well as new growths of the adult trees. Although some of the damage was overcome with new growth and pruning, damage was extensive enough to result in lower production. This frost caused some growers in the Adana area to reconsider earlier plans of substituting cotton land for citrus orchards. It was proved once again that the Adana plain, open to north winds, is not very suitable for lemons, but can be used for other citrus crops. Since lemons are the main citrus export of Turkey, and

1/ From a report by Oldrich Fejfar, Assistant Agricultural Attache, American Embassy, Ankara, Turkey.



areas suitable for lemon production are limited, Turkey's potential as a major competitor in world markets for citrus has its limitation.

Production for 1963-64 and estimates for 1964-65  
(Crop year beginning October 1)

Type of fruit	: 1963-64 Production (revised)	: 1964-65 Production (estimated)
	: <u>1,000 metric tons</u>	: <u>1,000 metric tons</u>
Oranges	: 300	: 283
Lemons	: 59	: 54
Tangerines	: 39	: 37
Bitter oranges	: 2	: 2
Grapefruit	: 2	: 2
Total	: 402	: 378

Conversion factors: Number of fruits per kilogram, oranges 6, lemons 12, tangerines 13, grapefruit 5, sour oranges 9.

Sources: State Institute of Statistics; Ministry of Agriculture; estimates by office of agricultural attache.

### Domestic Consumption

Domestic consumption of citrus in Turkey has been increasing for the past 10-12 years. Citrus is sold to new areas every year as roads and other facilities are developed. Turkey will consume most of the citrus produced, and only lemons will be sold abroad in volume. However, the Turkish Government is looking at citrus fruit exports as a new possibility of earning foreign exchange and is encouraging exporters.

Most of the citrus in Turkey is field-packed by hand. To export more citrus, Turkey must establish better marketing organizations in Europe and other importing countries, and also introduce modern standards required by most buyers.

### Exports

Turkey's total citrus exports during the 1963-64 crop year were lower than expected. The biggest reduction occurred in the export of oranges because of the frost. When the unusually cold weather struck last winter, most lemons had already been picked and exported, but oranges were still on the trees and were damaged very badly. Most frozen oranges were sold locally at low prices.

Indications are that during the 1964-65 crop year, about 15,000 metric tons of lemons and 5,000 metric tons of oranges would be exported from Turkey.

In the 1963-64 crop year, October through September, Turkish citrus exports were reported as follows:

Destination	Oranges	Tangerines	Lemons
	1,000 boxes (70-lb.)	1,000 boxes (70-lb.)	1,000 boxes (76-lb.)
Belgium-Luxembourg.....	5	--	17
France.....	--	--	8
Germany, West.....	28	18	213
Netherlands.....	22	--	54
Austria.....	--	12	--
Sweden.....	--	--	3
United Kingdom.....	16	--	5
Bulgaria.....	--	--	5
Czechoslovakia.....	--	--	26
Yugoslavia.....	16	--	--
Lebanon.....	1/	--	--
Syria.....	32	--	--
Saudi Arabia.....	9	--	--
Total.....	128	30	331

1/ Less than 500 boxes.

#### LEBANON 1/

#### Production

Revised trade estimates of Lebanese citrus fruit production for the 1963-64 marketing season, compared with 1962-63, and a forecast for the 1964-65 season, are given below:

Type	1962-63	1963-64 (Revised)	1964-65 1/ (Forecast)
	Metric tons	Metric tons	Metric tons
Oranges	95,000	101,000	115,000
Lemons	33,000	35,000	38,000
Tangerines	5,500	6,000	6,000
Grapefruit	2,500	2,600	2,700
Bitter oranges	350	350	350
Sweet limes	250	250	250
Total	136,600	145,200	162,300

1/ Trade estimates.

#### Exports

By June 1964, a record increase occurred in orange exports, which jumped from 85,600 tons during the same period of the 1962-63 crop year to the 92,200 tons

1/ From a report by Leslie C. Tihany, First Secretary, American Embassy, Beirut, Lebanon.



exported this year. Of this total, 89,400 tons were exported to the Arab countries, and 2,800 tons to USSR.

During the same period, lemon exports dropped because of severe winter weather to 23,800 metric tons, or 5,700 tons less than the 29,500 tons exported a year earlier. The Arab countries shared 11,600 tons, the Soviet Bloc countries 11,700 tons, and the Western European countries 500 tons, compared with respective figures a year earlier of 10,000 tons to Arab countries, 6,600 tons to Western European countries, and 12,000 tons to the Soviet Bloc.

#### New Fruit Export Subsidy

On January 25, 1964, a fruit export subsidy was granted by the Fruit Office to exporters of citrus and apples prepared for export in modern packing plants. The subsidy was valid until June 30, 1964, and retroactive to January 1, 1964. The subsidy was fixed at \$1,1613 per metric ton, and doubled for producer cooperatives that export their members' products.

As an additional inducement to increase exports, the Fruit Office approved an extra subsidy of (1) \$3.266 per gross metric ton of fruit shipped to Mediterranean and Black sea ports; (2) \$4,839 for shipments to ports in the Red Sea, the English Channel, the North Sea and the Baltic Sea; (3) \$6.452 per gross metric ton for fruit shipped to ports in West Africa, the Indian Ocean, and the Far East, and (4) \$8,065 per gross metric ton on shipments to ports in North and South America.

#### ISRAEL 1/

##### Area

Citrus area increased in 1963 to 38,055 hectares compared with 35,741 hectares in 1962. Shamouti oranges reached 20,260 hectares, while Valencia area rose to 6,295 hectares, grapefruit to 5,840, lemons to 1,781, and Navel oranges to 963. The full-bearing groves now amount to 18,239 hectares in addition to 14,736 partially bearing.

According to the Ministry of Agriculture's Five Year Plan, further plantings of 4,700 hectares of citrus will be made by 1969. These will comprise 2,300 hectares of Shamouti oranges, 1,300 of Valencia oranges, 600 of lemons, and 500 of other oranges. The plan does not specify grapefruit plantings. Current projections of the future grapefruit market have convinced the Government that further plantings should be stopped.

##### Production

The Citrus Marketing Board's preliminary estimate for the 1964-65 crop indicates a 5 percent increase over the 806,023-ton level of 1963-64. the 1964-65 crop is expected to reach 21.5 million boxes. Distribution according to

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1/ From a report by Volorus H. Hougen, Agricultural Attache, American Embassy, Tel Aviv, Israel.

variety is projected as follows:

<u>Type and Variety</u>	<u>Quantity</u> 1,000 boxes <u>1/</u>
Shamouti oranges	11,500
Valencia oranges	3,813
Navel oranges	500
Grapefruit	4,166
Lemons	900
Clementines	630
Total	21,509

1/ Box size is 7<sup>4</sup> for Shamouti oranges and grapefruit, 70 for all others.

Because of frost damage, some 500 hectares of trees will not bear fruit at all in 1964-65, and about 1,500 hectares will bear reduced yields. It is expected that by 1965-66 the moderately damaged trees will have recovered completely, while the more severely affected 500 hectares will be only partially recovered. The principal variety that suffered from the frost was lemons, the least damaged, grapefruit.

#### Marketing

As 27,600 metric tons of damaged fruit were destroyed in 1964, total marketing, at 778,423 metric tons in 1963-64, was only 12 percent higher than the 1962-63 level, although the 1963-64 crop exceeded that of 1962-63 by 16 percent.

Because of the large quantities of culls, the proportion of 1963-64 exports out of total marketed fruit was only 59 percent compared with 71 percent in 1962-63. The non-exportable fruit was diverted to processors who, with 241,410 metric tons or 31 percent of the total, took over double the quantity made available to them in 1962-63. Domestic edible consumption accounted for 80,005 metric tons, or nearly 10 percent of the total marketed crop. Processing plants operating at full capacity were able to take the greatly increased quantities, but in view of the difficulties this involved and the increase of fruit for processing expected in the future, a program for expanding these facilities is being prepared.

The consistent decline in the proportion of exports shipped to the United Kingdom in recent years was reversed in 1963-64, when it received 32.5 percent of exports compared to 29.2 percent in 1962-63. Germany's share of exports dropped from 20.0 percent in 1962-63 to 17.7 percent in 1963-64. Sweden replaced the Netherlands as the third largest market for Israeli citrus. The Netherlands' share was thus 6.6 percent of the total instead of 7.3 percent in 1962-63. France came fifth with 5.7 percent of the market. This also constitutes a drop from the 6.8 percent it accounted for in 1962-63. Shipments of citrus to Canada and the United States remained substantially unchanged from the 1962-63 level and amounted in 1963-64 to 187,785 boxes for Canada, and 49,758 boxes for the United States.



Israel has become growingly concerned over tariff barriers being set up by the European Economic Community on citrus imports from "third countries". After prolonged negotiations a trade agreement between Israel and the EEC was made, coming into effect on July 1, 1964. Under the terms of this agreement the tariff on fresh grapefruit was reduced from 12 percent to 7.2 percent and the tariff on grapefruit juice was reduced from 19 percent to 17.1 percent ad valorem; Common Market countries maintaining national rates higher than the new level reduced them to the common external tariff (CXT). In addition, France agreed immediately to align its tariffs on fresh oranges, orange juice, and other citrus juices, except grapefruit juice, with the CXT. France also agreed to remove quantitative import restrictions on canned grapefruit and to increase its quota on citrus fruit juices.

The export of citrus processed products rose by 25 percent in the first 9 months of 1964 to reach \$15,989,500 compared with exports valued at \$12,790,000 for the whole of 1963.

The Citrus Marketing Board has estimated that in the 1964-65 season, fruit available for export will surpass the 1963-64 export level by 19 percent to reach 13,712,000 boxes. This is expected to be distributed according to type as follows:

<u>Type and Variety</u>	<u>Quantity</u>
	<u>1,000 boxes</u> <u>1/</u>
Shamouti oranges	7,820
Valencia oranges	2,478
Navel oranges	300
Grapefruit	2,714
Lemons	400
Total	<hr/> 13,712

1/ Box size for Shamouti oranges and grapefruit is 7<sup>4</sup>, and 70 for all others.

Plans for marketing the greatly increased exports will be assisted by an increase in promotion activities with a budget of \$1,550,000. Traditional, as well as newer, markets will be shipped more Israeli citrus. The United States is scheduled to receive more than double the 49,758 boxes shipped there in 1963-64.

Growers' net returns are under pressure of rising costs. Freight rates for citrus shipments will increase in 1964-65 to 94 cents per box for ventilated stowage from Israel to U. K. ports, and labor costs are constantly on the rise. It is generally believed that the level of profits attained by growers in recent years will not be repeated in the future.

UNITED ARAB REPUBLIC 1/

The area devoted to principle citrus fruits during the past decade has been increased from 42,308 feddans in 1953 to 85,498 feddans in 1963. Production of oranges, tangerines, limes, and sweet lemons increased from 361,960 metric tons in 1953 to 437,180 metric tons in 1963--an increase of 75,220 metric tons, or 20.8 percent.

<u>Variety</u>	<u>Estimated production</u>	
	<u>1963</u> <u>1,000 metric tons</u>	<u>Compared to 1962</u> <u>percent</u>
Oranges, sweet	337	- 20
Oranges, bitter	1	--
Tangerines	49	- 19
Lemons, acid	2	--
Lemons, sweet	1	- 34
Limes	49	- 12
Grapefruit	<u>1/</u>	--

1/ Less than 500 metric tons.

The main reason for the decline was the hot and sandy winds (Khamaseen) blowing during the blooming season, badly affecting the blossoms and reducing the yield of fruits.

Foreign Trade (Exports)

The U.A.R.G. is seeking new markets, particularly in the African and Asian continents, in addition to the traditional market of the neighboring Arab countries and Europe. Citrus exports during 1963 amounted to 4,395 metric tons oranges, 446 metric tons limes, and 261 metric tons tangerines. Comparative figures of the same past period were 5,282 metric tons oranges, 1,718 metric tons limes, and 620 metric tons tangerines. The leading markets for 1963 exports were Malaya, West Germany, United Kingdom, and Yugoslavia. These were markets exclusively for oranges. Saudi Arabia was the only client for limes and tangerines.

U.A.R. citrus has met with keen competition from other citrus exporters to the European markets.

Consumption

Domestic consumption in 1963 is estimated at approximately 332,801 metric tons oranges, 49,042 metric tons limes, 48,934 metric tons tangerines, 2,157 metric tons lemons, 1,300 metric tons sweet lemons, 898 metric tons bitter oranges, and 325 metric tons of grapefruit. There was a 40,832 metric ton, or 10.35 percent, increase in citrus consumption over 1962 levels, with 1963 domestic consumption estimated at 34 pounds per capita.

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1/ From a report from the office of James A. Hutchins, Jr., Agricultural Attache, American Embassy, Cairo, Egypt.



## BRITISH HONDURAS 1/

### Production

The citrus industry of British Honduras has completely recovered from the damage inflicted by Hurricane "Hattie" of October 1961. Orange production in 1962-63 reached an all-time high of 758,000 boxes, while grapefruit production totaled 232,000 boxes as compared with 106,000 boxes a year earlier. Production of oranges in 1963-64 amounted to 847,058 boxes, up 12 percent from the previous year. Grapefruit production in 1963-64 totaled 317,000 boxes, representing an increase of 37 percent from 1962-63. Production of oranges in 1965 are currently forecast at 1.0 million boxes, while grapefruit output is estimated at 325,000 boxes.

The acreage planted to oranges increased from 4,000 acres in 1962 to approximately 6,000 acres by January 1964. Estimates indicate that about 1,000 acres of new groves will be planted annually during the next 4 to 5 years. Most of the plantings will take place in the Stann Creek and Cayo Districts. Little or no expansion is taking place in the area planted to grapefruit and grapefruit acreage is expected to remain near the current level of 1,600 acres.

New plantings are not expected to be reflected in orange production until 1965 and later. However, adoption of better management practices on the groves currently bearing is forecast to increase orange production by 15-20 percent per year. The effect of new plantings and larger yields from older orange groves are forecast to result in a 30-40 percent increase in the annual production after 1965.

The installation of a frozen concentrate plant in the spring of 1963, combined with the substantial increase in prices paid producers, about \$2.02 per box in 1963 compared with about \$0.70 in 1962, were the major incentives in the expansion of the citrus industry of British Honduras.

### Exports

In 1962, the United Kingdom was the leading export market for British Honduras' citrus products and took 63 percent of total shipments. Nearly \$700,000 worth of orange concentrates and a small quantity of grapefruit concentrates were shipped to the United States in 1963. Significant quantities of orange juice and orange concentrates went to Canada. Mexico purchased some fresh oranges and grapefruit and the United Kingdom and France most of the orange oil.

### Marketing

In 1962, the United Kingdom took 99 percent of the citrus products exported by British Honduras, as compared with only 63 percent in 1963. In 1963, the British Honduras Fruit Company processed 211,000 boxes of oranges and some grapefruit in their new frozen concentrate plant. Most, if not all, of their concentrates went either to the United States or Canada. In 1964, this plant processed approximately 50 percent of the 1963-64 orange crop and some grapefruit.

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1/ From a report by Dalton L. Wilson, Agricultural Attache, American Embassy, Guatemala City, Guatemala.

For 1962-63 production of citrus products by the Citrus Company of British Honduras was:

<u>Item</u>	<u>Plant "A"</u>	<u>Plant "B"</u>
	<u>Net weight</u> <u>1,000 lb.</u>	<u>Quantity</u> <u>1,000 gal.</u>
Grapefruit:		
Sections	4,735	--
Juice	842	--
Concentrate	61	36
Oranges:		
Juice	6,727	--
Concentrate 6/1	1,458	--
Concentrate 60-65 brix	1,138	163
Juice 65/66 brix	373	--
Fresh oranges	1,943	--
Sweet orange oil	102	--
Concentrate 42 brix	--	8

Source: British Honduras: Annual report of the Agricultural Department 1963.

#### JAMAICA 1/

Unfavorable weather conditions, beginning with Hurricane "Flora" last year, affected the 1963-64 citrus crop, but not as seriously as was anticipated earlier.

Providing the present favorable weather continues, it is likely that the 1964-65 crop of grapefruit will exceed the 1963-64 crop by about 20 percent. This is attributed to increased plantings in recent years, which are now coming into bearing. Ortaniques (orange-tangerine cross) are also expected to show a substantial gain. Production of citrus fruit for 1963-64, and estimated for 1964-65 follows:

<u>Variety</u>	<u>Production</u>	
	<u>1963-64</u> <u>1,000 boxes</u>	<u>1964-65</u> <u>1,000 boxes</u>
Oranges	1,475	1,700
Grapefruit	690	700
Other varieties	77	90

Nearly all Jamaican citrus and citrus products are exported and sold in the United Kingdom, but some Ortaniques (a kid-glove orange) are shipped to New Zealand and the United States.

Dissatisfaction with the arrangement between Jamaica and Florida citrus juice processors is reported in Kingston. Although the agreement has been in effect now for almost a full year, only two small shipments (total 11,000 U. S. gallons) of Jamaica hot concentrate are reported to have been accepted by the Florida processors.

1/ From reports of William B. Callan, Agricultural Attache, Port-of-Spain, Trinidad.



JAMAICA: Citrus fruit and citrus product exports, by type and destination,  
September 1, 1963 to June 30, 1964

Item	Unit	Destination					
		United Kingdom	United States	Canada	New Zealand	Other	
Oranges	:1,000 boxes	: 1	: --	: --	: 85	: 2	
Grapefruit	: do	: 171	: --	: --	: 15	: 5	
Other citrus	: do	: 65	: 8	: --	: 10	: --	
Grapefruit sections	:1,000 lbs	:19,252	: --	: --	: --	: 413	
Orange sections	: do	: 1	: 4	: --	: --	: --	
Citrus pulp	: do	: 54	: 9	: --	: --	: 670	
Single-strength juice:							
Grapefruit	:1,000 gals.	: 345	: --	: 11	: --	: 41	
Orange	: do	: 28	: --	: 205	: --	: 45	
Lime	: do	: 385	: 3	: --	: --	: 3	
Concentrated juice:							
Grapefruit	: do	: 90	: --	: --	: --	: --	
Orange	: do	: 153	: 39	: 55	: --	: 21	
Essential oil:							
Orange	:1,000 lbs.	: 82	: 40	: 7	: --	: 6	
Lime	: do	: 43	: --	: 1	: --	: 1	
Grapefruit	: do	: 1	: 1	: --	: --	: --	

TRINIDAD AND TOBAGO 1/

Production of oranges and grapefruit for the current and previous crop years, with a forecast for the coming year, follows:

	Oranges	Grapefruit
	<u>Boxes</u>	<u>Boxes</u>
	<u>100-lb</u>	<u>80-lb.</u>
Crop year, 1962-63	189,998	572,404
Crop year, 1963-64	251,978	598,963
Forecast, crop year, 1964-65	400,000	800,000

Exports, 1963-64

Preliminary data indicate that 100,000 boxes of fresh grapefruit were shipped to the United Kingdom and 32,000 boxes to West Germany. Of the canned segments shipped, it is estimated that 90 percent went to the United Kingdom. Most of the juice exported also went to the United Kingdom.

1/ From a report by William B. Callan, Agricultural Attache, American Embassy, Port-of-Spain, Trinidad.

Utilization for 1963-64

	<u>Fresh Fruit</u> <u>Boxes</u>	<u>Canned Sections</u> <u>Cases 1/</u>	<u>Canned Juices</u> <u>Cases 2/</u>
Grapefruit	132,870	111,361	425,790
Oranges	5,104	1,463	369,410

1/ A case contains 24 cans of 19-oz. net weight each.

2/ A case contains 24 cans of A2's.

Citrus pulp meal is produced for stock feed. This year the plant produced 3,100 tons, of which 1,200 tons were used locally and 1,900 tons exported.

The Citrus Growers Association plans to move their processing plant to a new location immediately after the 1964-65 crop. The present plant has become congested.

Marketing Situation and Outlook

The removal of restrictions previously imposed by the United Kingdom on imports of frozen concentrated orange juice from the United States will bring into effect the recently concluded agreement between Florida interests, Jamaica and Trinidad regarding marketing of frozen concentrated orange juice. Trinidad will produce frozen concentrated orange juice when the new processing plant is completed. The Citrus Growers Association have purchased 18,000,000 A2 cans from suppliers in the United States.

MEXICO 1/

Production

Production of citrus fruits in Mexico, for 1962-1965, follows:

	<u>1962 1/</u> <u>Metric tons</u>	<u>1963 2/</u> <u>Metric tons</u>	<u>1964 3/</u> <u>Metric tons</u>	<u>1965 4/</u> <u>Metric tons</u>
Oranges	786,450	800,360	790,000	810,000
Limes	108,040	108,770	114,000	115,000
Grapefruit	7,020	7,200	7,500	7,800

1/ Official, final. 2/ Official preliminary estimate. 3/ Forecast.

4/ Projection of expected 1965-66 crop.

The 1964 Mexican orange crop is now forecast at 790,000 metric tons. This is a slight decrease from the preliminary estimate of 800,360 metric tons. The major part of the reduced output occurred in the Coatepec and Cordoba areas in the State of Veracruz where a lack of rain cut production by an estimated 30 to 50 percent. The decrease is partly offset by expected increase in the State of Nuevo Leon of 30 percent over the 1963 crop. The States of Veracruz

1/ From a report submitted by Henry Hopp, Agricultural Attache, American Embassy, Mexico City, D. F., Mexico.



and Nuevo Leon produce about 65 percent of the total Mexican orange crop. Reports from other producing areas indicate normal production in 1964.

The orange crop of 1965 is expected to be about 810,000 metric tons. Reports from the State of Nuevo Leon indicate that production in that area in 1965 or 1966 will reach the levels attained before the heavy freeze of 1962.

In 1964, Mexican lime production is estimated at 114,000 metric tons. This represents an increase of about 5 percent over the 108,700 metric tons estimated for 1963. The coming into production of new trees in the State of Colima has been partly responsible for the expected increase. Production in 1965 is expected to be about 115,000 metric tons.

#### Prices and Crop Utilization, 1964

Prices of oranges in Mexico City rose to higher than normal levels during the summer of 1964 because of drought conditions in the producing areas which supply a large part of the consumption in the capital city.

Utilization of 1964 citrus crops is shown:

<u>Commodity</u>	<u>Fresh Fruit</u> <u>Metric tons</u>	<u>Juice &amp; Essential Oil</u> <u>Metric tons</u>	<u>Total Crop 1/</u> <u>Metric tons</u>
Oranges	750,500	39,500	790,000
Limes	68,400	45,600	114,000
Grapefruit	7,350	150	7,500

1/ Forecast.

#### Exports

Total exports of citrus fruits were 38,768 metric tons in the January-August 1964 period, which represents an increase of about 38 percent over the same period of 1963 when 28,055 metric tons were exported.

Oranges accounted for 36,834 metric tons, or about 95 percent of total exports in January-August 1964. These exports represent an increase of 43 percent over the same period of 1963. Exports of oranges in calendar year 1964 are forecast to exceed 1963 exports by 20 percent and will probably be three times higher than 1962 exports.

January-August exports of limes were down slightly in 1964 compared with 1963. Total exports during 1964 should be approximately the same as in 1963, when 2,214 metric tons were exported. Grapefruit exports are expected to remain about the same as in 1963.

Exports of fruit juices increased 91 percent during January-August 1964, over the 2,272 metric tons exported in the same period of 1963 and consisted almost entirely of orange juice. Orange juice exports totaled 4,229 metric tons during January-August 1964, which is an increase of 106 percent over the 2,053

metric tons exported in the same period of 1963. According to trade sources, orange juice exports in 1965 may double those of 1964.

Mexican citrus exports are reported as follows:

<u>Item</u>	<u>1963</u>	<u>1963</u>	<u>1964</u>
	<u>Calendar year</u>	<u>Jan.-Aug.</u>	<u>Jan.-Aug.</u>
	<u>Metric tons</u>	<u>Metric tons</u>	<u>Metric tons</u>
Oranges	42,267	25,704	36,834
Limes	2,195	1,679	1,514
Grapefruit	677	658	413
Lime juice	578	218	101
Orange juice	3,197	2,272	4,330
Lime oil	256	113	65

Imports of citrus fruits and juices remained about the same during January-August 1964, as compared with the same period of 1963. Almost all imports went into the free zone. Mexico is continuing to add restrictions on imports of citrus and citrus products.

MEXICO: Imports of citrus and citrus products, Jan.-Aug., 1963-64

Product and Origin	Jan.-Aug. 1963:	Jan.-Aug. 1964		
		Interior	Free Zone	Total
	<u>Metric tons</u>	<u>Metric tons</u>	<u>Metric tons</u>	<u>Metric tons</u>
Lemons				
U. S. ....	1,719.8	--	1,652.0	1,652.0
Japan. ....	--	--	4.0	4.0
Total. ....	1,719.8	--	1,656.0	1,656.0
Oranges				
U. S. and total. ....	1,257.2	--	2,080.9	2,080.9
Grapefruit				
U. S. and total. ....	151.9	1.0	222.7	223.7
Total citrus fruit	3,128.9	1.0	3,959.6	3,960.6
Orange juice				
U. S. and total. ....	14.7	--	48.3	48.3
Grapefruit juice				
U. S. ....	180.8	204.1	8.1	212.2
Others. ....	--	--	--	--
Total citrus juice	195.5	204.1	56.4	260.5
Citric acid				
U. S. ....	--	2.0	--	2.0
Israel. ....	30.3	--	--	--
Other. ....	--	--	--	--
Total. ....	30.3	2.0	--	2.0



JAPAN 1/

Consumption of citrus fruit in Japan continues to grow, resulting in expanded plantings and increased imports. Production of Satsuma oranges, by far the major citrus crop, continues to expand each year at a rate of about 10 percent, reflecting mainly continued planting. In May 1964, lemon imports were liberalized and imports, all from the United States, have risen sharply since that time. Prices for U. S. lemons, on the other hand, have dropped sharply. Imports of grapefruit and oranges, almost all from the United States, also are expanding, reflecting larger import quotas to meet the larger demand. Exports of canned and fresh Satsuma oranges are expected to be up about 20 percent in the 1964-65 season (estimated at 4.5 million cases of canned fruit and 13,500 metric tons of fresh).

Area, Production and Utilization of Satsuma Oranges

The total area planted to Satsuma oranges (or mandarins) was an estimated 99,000 hectares in 1964, representing an increase of 10 percent from 1963. This reflects governmental support for expanding planted areas, particularly financial and technical assistance to plant terraced hillsides, and the good returns being realized by producers of Satsuma oranges.

Total Satsuma output in 1964 is forecast at 1,090,300 metric tons, up about 12 percent over the 973,800 metric tons produced in 1963. Practically all this increase is explained by the 10 percent rise in the area of fruit-bearing trees.

Fresh orange consumption (including exports) accounted for about 80 percent (781,652 metric tons) of the 1963 Satsuma crop. About 15 percent (150,553 metric tons) were used for canning, and the rest went to jam and juice industries. In 1962, a somewhat larger share of the crop (almost 20 percent or 177,204 metric tons) was used for canning because of low quality, which greatly reduced the value of the fruit on the fresh fruit market. In 1964, an estimated 170,000 metric tons will be used for canning.

Canned Satsuma production from the 1963 crop totaled 7 million cases (each containing 48 cans of 11 ounces), requiring slightly more than 20 kilograms of fresh oranges per case. Production from the 1964 crop is estimated at 8 million cases, or 4.5 million for export and 3.5 million for domestic use. The government continues to inspect and maintain standards for exported canned Satsuma only. Domestically marketed products are not inspected.

The basic export price for Satsuma oranges is determined each year by negotiation between the Citrus Exporters Association and the Ministry of International Trade and Industry (MITI). The price is decided on the basis of export performance of the previous year, the prospective size of the current crop and local market conditions. In 1962, the export price was \$1.00 f.o.b. per case (9 pounds) and exports, mostly to Canada, were 13,460 metric tons. The 1963 price was raised to \$1.50 f.o.b. per case, and exports fell to 11,988 metric tons. Canadian importers complained that, because of high prices, they were unable to move

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1/ From a report submitted by James C. Frink, Acting Agricultural Attache, American Embassy, Tokyo, Japan.



the smaller volume with any profit. Consequently, the 1964 price has been set at \$1.23, f.o.b. per case, and producers and MITI expect an export volume about 20 percent above that of 1963, or around 13,500 metric tons. Fresh orange exports during the 1963-64 marketing season were 2.23 million cases, 54 percent of which were from Shizuoka Prefecture.

The Canned Fruit Sales Association set an export target of 4 million cases (net weight of 33 pounds per case) during the 1963-64 season. Actual exports totaled 3,915,000 cases, or slightly below the target. Of the 1963-64 export target, 1,553,000 cases were shipped to the United States and 1,469,000 cases to the United Kingdom.

Recently, the Association set an export target for 1964-65 of 4.5 million cases, up almost 600,000 cases over the actual volume shipped in 1963-64, and one-half million cases above the 1963-64 target. The export floor price is expected to be somewhat below the \$3.35 per small case (24 cans of 11 ounces) set in 1963, and probably will be around the \$3.15 floor price of 1962-63.

On an annual basis, exports of canned Satsuma dropped from 57,659 metric tons in 1962 to 49,329 tons in 1963. Exports to the United States, the leading 1963 market, totaled 20,298 metric tons, down slightly from the 20,530 tons shipped in 1962. Exports to the United Kingdom in 1963 were 18,566 metric tons, compared with 24,640 tons in 1962.

Data for the first half of 1964 indicate that the United Kingdom will regain its position as the leading market this year. In January-June, shipments totaled 18,119 metric tons, with exports to the United States 13,176 tons.

#### Imports of Fresh Citrus

In May 1964, imports of fresh lemons were liberalized. Oranges, grapefruit, and tangerines remain under the import quota system. All other citrus is liberalized, but imports are negligible.

Lemon liberalization has resulted in many predicted changes in the import and price picture. Lemon imports totaled 7,772 metric tons in the first 8 months of 1964 compared with 4,042 tons throughout 1963. In the 3-month period, June-August 1964, imports were 5,334 metric tons. This import volume was somewhat larger than local marketing facilities were geared to handle, and resulted in a glut of lemons in the larger markets of Tokyo and Osaka. Wholesale prices dropped sharply, not only because of oversupply, but because the premium previously paid for import licenses was no longer necessary. In the first 4 months of the year, wholesale prices for U. S. lemons averaged about 56 cents per pound in the Tokyo market, but in the June-August period, this average had dropped to around 19 cents per pound. Throughout much of August, wholesale prices were slightly below the combination of the landed cost plus the 20 percent import duty. In October 1964, the situation improved considerably, and wholesale prices were around 22 to 23 cents per pound, or enough above the landed cost of \$5.75 per case for the importers to make a profit.

Early in 1964, a fruit show was held at the Tokyo U. S. Trade Center in which U. S. grapefruit was prominently displayed and sampled. Many Japanese who attended were not familiar with this fruit, but were apparently pleased with



it. Consequently, imports of grapefruit, which totaled only 433 metric tons in 1963, reached 603 metric tons in the first 8 months of 1964. The import quota for oranges and/or grapefruit during the first half of Japanese Fiscal Year 1964 (April-September) was 1,700 metric tons. The quota for the last half of the year has not been announced, but is expected to be the same as that of the first half.

Japanese imports of citrus fruits by sources for 1962-63, and January-August 1964, were as follows:

Source	Oranges			Lemons and Limes			Grapefruit		
	1962	1963	1964	1962	1963	1964	1962	1963	1964
	Total	Total	Jan.-Aug.	Total	Total	Jan.-Aug.	Total	Total	Jan.-Aug.
	Metric tons	Metric tons	Metric tons	Metric tons	Metric tons	Metric tons	Metric tons	Metric tons	Metric tons
U. S.	204	479	458	3,721	4,042	7,769	362	422	587
Mexico	--	--	--	--	--	3	--	8	--
Other	3	--	--	--	--	--	3	3	16
Total	207	479	458	3,721	4,042	7,772	365	433	603

Source: Customs Bureau, Ministry of Finance.

#### Import of Citrus Juices

Imports of citrus juices remain under the import quota system, and quotas are allocated under the Western-style hotel allocation category. Consequently, imports of citrus juices remain at a fairly low level. During the first 8 months of 1964, imports of orange juice (sugared and not sugared) totaled 95,111 kilograms, compared with 114,115 kilograms in January-August 1963. Imports of orange juice have been declining because production of canned Satsuma orange juice is increasing, and relatively good orange juice, although expensive, is available locally. The Ministry of Agriculture and Forestry is studying the possibility of liberalizing imports of citrus juices, but except for lemon juice, the situation does not seem particularly favorable. Recently, producers of canned Satsumas requested the government to ease restrictions on orange juice imports in order to reduce competition for oranges between canners and juice makers. Juice makers are opposed to this proposal.

Japanese imports of citrus juices, by source, for 1962-63, and January-August 1964, were as follows:

Source	Orange juice, sugared			Orange juice, not sugared		
	1962	1963	Jan.-Aug. 1964	1962	1963	Jan.-Aug. 1964
	Metric tons	Metric tons	Metric tons	Metric tons	Metric tons	Metric tons
United Kingdom	.3	--	--	--	--	--
United States	2.6	1.3	1.4	274.7	131.3	93.7
Other	--	--	--	--	1.4	--
Total	2.9	1.3	1.4	274.7	132.7	93.7

Source: Customs Bureau, Ministry of Finance





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